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Residential Information Update 2003-2007

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SHORT-TERM GROWTH MANAGEMENT STRATEGY INFORMATION UPDATE 2003 - 2007

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FOREWORD

The land development and house-building industries attempt to be as responsive as possible to changes in the marketplace. The amount of housing constructed, the location of development activity and the types of housing at any point in time will vary with changing rates of population growth, consumer preferences, interest rates, house prices, expectations for the future and competition in the marketplace.

It is also important to note that this distribution of market expectations reflects the unique circumstances in each sector with respect to the availability of land and infrastructure (serviced land) as well as the ownership of developable land in any given sector. The timing and scale of servicing and subdivision expectations may be more directly affected by marketing strategies of individual developers which can effect the amount of housing constructed in a given sector.

As a result, the transition of "raw" land (i.e., vacant or in agricultural use) to fully-serviced, subdivided, "ready-to-build-on" lots involves a good deal of uncertainty. **The amount of development in any given year is not certain, nor is its distribution among various builders, developers and communities.**

Within this changing environment, the City is called upon to provide utilities and transportation services to enable the "bringing on-stream" of new lands for development. The timing of expenditures for sewers, water and other utilities must occur prior to housing construction. Some transportation facilities may be needed to provide initial access to new development — other facilities may be provided later, as areas develop. The City must also plan for and provide a wide range of other municipal facilities and services to new communities as they grow.

The challenge facing the City then, is to be prudent in avoiding the premature extension of costly utilities and services while making every effort to support a competitive, efficient land development process. This ongoing "balancing" occurs in several forums at the same time (e.g., planning and subdivision approvals, budgeting processes, utility construction scheduling). To assist this balancing process, a shared view of the next five years is necessary.

This report is designed to provide an accurate description of recent suburban residential development activity in Calgary and to forecast activity for the 2003–2007 period. **The report does not contain policy recommendations or explicit budget priorities** — its contribution lies in providing a solid, comprehensive information base to support planning, development and budgeting decisions for utilities in the short-term.

New for this year is a slight re-design of the document as well as some new information and layout improvements. Information changes to the document are outlined below:

- Removed: "Congested Signalized Intersections 1996"
- Removed: "Market Share of New Single Family/Duplex Units by Sector" previous year chart
- Added: "Figure 30: Units Associated with Residential Building Permit Applications, by Sector and Community 2002"
- Added: "Figure 31: Units Associated with Residential Building Permit Applications, by Sector, Historical 1998 - 2002"

1 EXECUTIVE SUMMARY AND CONCLUSIONS

The purpose of this report is to examine the expected fit between residential land demand and supply over the coming five year period (2003 - 2007). **The intent is to ensure that there exists a sufficient supply of readily developable land, in a variety of locations, to facilitate competitive land and housing markets, while avoiding premature municipal investment in utilities and services.** It is recognized that supply and demand conditions are in a constant state of flux and that it is important to monitor changes on an ongoing basis and to review circumstances annually.

On the basis of the analysis presented in this report, the Growth Management Technical Team presents the following conclusions:

- Over the next five years, Calgary's population is expected to increase by an average of approximately 16,800 people per year, for a total increase of approximately 84,000 people by the year 2007. This is based upon updated information from the "Socio-Economic Outlook 2002-2007 Calgary & Region Report."

- Demand for new single family/duplex housing is expected to average at 6,200 units per year, resulting in an increase of approximately 31,100 new units between 2003 and 2007.

- The demand for new single family/duplex housing in new suburban areas will likely require approximately 4,800 acres (Figure 33) of land over the next five years, or approximately 900 - 1,000 acres per year.

- Demand for new multi-family housing (apartment and townhouse) is expected to be about 15,900 units total for the 2003 and 2007 period or 3,180 units per year. Of this, approximately 41% (up to 6,500 units) are estimated to be built in the developing suburban communities over the five years. Multi-family is difficult to predict in location, units and timing for any particular sector. For this reason the bulk of this report measures the more predictable land needs of Single Family/Duplex growth.

- **The likely distribution of this suburban growth over the next five years is shown on Map 7 of Appendix I. These forecast growth locations should be considered as possible growth directions. Actual locations may and do vary. The colours denote general development**

patterns of which the specific timing of development is not certain. The information will be reviewed and updated annually and is not intended to control absorption rates or limit choice and competition in the market place.

- The supply of residential land categorized as "Fully Serviced" or as in past years with "Utility Capacity in Place," is sufficient to satisfy expected demand on a **city-wide** basis through the five year forecast period. **However, serviced land shortages may occur in particular sectors within the next five years unless new service extensions are undertaken.**

- On the basis of the forecasts contained in this report, and assuming that a "Fully Serviced" supply of land with "Utility Capacity in Place" is maintained in each sector, The City should consider undertaking or facilitating utility extensions over the next five years in the sectors shown below.

Sector	Probable Year in Which Utility Extensions Will be Required	Utility Extensions Required to Service Areas Considered "Partial Serviced" (Yellow Areas)
North	after 2007	Water and Sanitary
Northeast	2007	Water
East	---	---
Southeast	after 2007	Storm
South	after 2007	Water, Storm, Sanitary
West	2003-2004	Water, Sanitary, Storm
Northwest	2004	Water

It cannot be assumed that "yellow" areas will be developed before "red" areas (areas with no capacity in place).

In terms of transportation requirements, the existing transportation infrastructure with the identified upgrading and new links (refer to Sections 9 and 10) has the capacity to support the initial development of most areas. However, the new subdivisions will impact the adjoining transportation network. It should be noted that many intersections throughout the city are already operating at capacity and failing during peak periods. These new developments, compound with the overall growth in the city, will further degrade the level of service of the transportation system unless additional expenditures are made beyond those in the City's current capital budget envelope. Alternatively, measures implemented to increase the current modal split in favour of modes other than auto could lesson the demand on the transportation road network, especially during the peak travel periods.

Transportation Infrastructure Investment Plan (TIIP)
In 1999, the Government of Alberta announced a new transportation funding program through which The City has been receiving five cents per litre from vehicle fuel sold within the city limits, replacing the previous transportation capital grant program. The Urban Development Institute

through transportation acreage assessment and the Calgary Parking Authority also have committed to provide additional funding for transportation projects. Based on this funding, The City developed a Transportation Infrastructure Investment Plant (TIIP) to ensure that Calgary's transportation system can accommodate growth.

The Transportation Infrastructure Investment Plan includes upgrading and extensions to the roadway network, expansion of the existing LRT system, and purchase of new buses and light rail vehicles. The TIIP reflects the goals of the Calgary Transportation Plan and is part of a comprehensive approach to transportation planning in Calgary. The TIIP is reviewed and approved annually by Council.

City Council approved the latest Transportation Infrastructure Investment Plan (TIIP) in April 2002, which revised the ten-year program (1998-2007) to $1.158 billion. There was also identified $42 million worth of projects being deferred to 2008. The total for TIIP projects including the deferral was $1.2 billion. In October 2002 the time-frame for TIIP projects was expanded from 2007 to 2010, as directed by Council, and it now totals $1.6 billion. Almost 50% of the 2003-2007 tax-supported Capital Budget is for TIIP projects. Some of the major TIIP projects included in the five-year budget are completion of the NW LRT to 53 Street in 2003; South LRT extension from 146 Avenue to 162 Avenue, completion by 2005; NE LRT extension to Prairie Winds, completion by 2007.

For further information on the TIIP, see the Capital Budget 2003-2007.

The City also anticipates requests from individual developers to extend services to new areas. *Accommodating Growth: A Framework for Coordinating Municipal Capital Investment* outlines the protocol for evaluating these requests through the policy plan and outline plan processes and the Growth Management Technical Team and Steering Committee when required.

Decisions on capital expenditures relating to the extension and/or upgrading of municipal water, storm, sanitary, and transportation systems, should give consideration to:

- the overall capital cost implications of the extensions, including the cost of other services The City provides;
- The City's financial capability;
- existing market conditions and anticipated demand as they relate to the proposed expenditure; and
- the impact of these decisions on the provision of gas, electric, telephone and cable services (Calgary Plan, 2-2.2.2.1l).

2 PURPOSE OF THE UPDATE

This report assesses Calgary's current residential land inventory as well as expected supply/demand conditions for the coming five year period (2003-2007). This information base is updated annually, in accordance with the Short-Term Growth Management Strategy, as approved by Council in February, 1985.

The report is intended to be used in two ways:

- to provide a common information base and set of forecasts (related to the next 5 years' growth) to support facilities planning and budgeting by civic departments; and

- to provide the Growth Management Technical Team with a detailed and up-to-date analysis of suburban growth dynamics, providing a framework in which to evaluate the merits of individual requests for new service extensions in suburban areas.

  The report is not intended to be used as a benchmark for determining, specifically, where development in the City is most appropriate. Nor is this report to be referenced as the sole source in determining what land may be subject for development. This determination will be evaluated by applicants and The City who will assess the variables of development.

Appendix I provides a detailed look at historical information and future estimates on residential growth in the form of figures and maps.

Appendix II of this report also provides an overview of residential growth areas on a sector by sector basis.

The information base has been developed jointly by staff in several civic departments including representatives of the following portfolios:

Land Use & Mobility
Utilities & Environmental Protection
Community Vitality & Protection
Corporate Services
Strategic Services

In preparing this report, the team also consults with representatives of the Urban Development Institute and the Calgary Region Home Builders' Association.

3 ECONOMIC OUTLOOK: 2003 - 2007

Calgary's overall economic prospects for the coming five year period were reviewed by The City's Corporate Services in the Fall of 2002 (Socio-Economic Outlook 2002-2007 Calgary & Region) with some updated information provided in the Spring of 2003. Some of the conciusions of this analysis are summarized below.

- Five year forecast for the Calgary economy:

	2003	2004	2005	2006	2007
Inflation Rate CMA (%)*	2.5	2.5	2.4	2.3	2.2
Population (000's)**	924.0	942.0	959.0	974.0	989.0
Net Migration **	11,000	10,000	10,000	8,000	8,000
Unemployment Rate CMA (%)**	5.1	4.4	4.3	4.5	4.6
Total Housing Starts**	10,500	9,500	9,100	9,000	8,900

* Annual % change, Calgary Census Metropolitan Area

** Annual level, City of Calgary

- The Economic growth in the Calgary Economic Region quickened from 3.6% annually over the 1990 to 1995 period to 5.0% from 1995 to 2001.

- The Calgary Economic Region is expected to grow by 3.0% in 2002, 4.3% in 2003 and 3.0% by 2007.

- From 2003 to 2007, economic growth should be driven by an expanding world economy, increased business spending and firm consumer demand. However, growth could be constrained by a tight labour market. The aging of the baby boom population and competition from other locations is expected to restrict labour supply in Calgary. The number of individuals leaving the labour market could exceed the number entering it.

- Total employment is expected to increase 2.0% annually over this period while the unemployment rate will rise to 5.1% in 2003 and level at around 4.5% to 2007.

- The forecasts shown here predict the total population to reach 989,000 in 2007. This is an annual average rate of 16,800 people per year over the 2002 population of 904,987.

- The forecast demand for total housing starts for the 2003 to 2007 period is expected to average approximately 9,400 units per year.

4 POPULATION GROWTH: 2003 - 2007

Calgary's population grew from 876,519 in April 2001 to 904,987 in April 2002, an increase of 28,468 people, or approximately 3.25%. The percentage increase almost doubled from the year before, where Calgary experienced a 1.83% increase. The last time growth reached close to this level was in 1998 which added 28,629 people.

Net migration was 20,962, an increase of 12,971 above the 2001 figure. The natural increase, the result of births over deaths, was 7,506.

City population forecasts produced in October, 2002 and current updates suggest that Calgary's population will increase by approximately 84,000 people by 2007 (Figure 1).

Net migration is forecast to range from 11,000 persons in 2003 to 8,000 in the year 2007. This level of net migration combined with natural increase will result in **total** population growth averaging 16,800 persons per year over the forecast period. Figures 2, 3 and 4 compare this forecasted level of growth with that experienced since 1990.

The forecasts shown here predict the total population to reach 989,000 in 2007.

5 HOUSING FORECASTS: 2003 - 2007

The demand for new housing is driven by both an increase in the number of households (e.g., an increasing population and/or changes in its composition) and changes in consumer housing needs/preferences (e.g., consumers choosing a newer or larger house). In turn, the make-up of the population creating a demand for housing at any point in time will affect the level of demand in particular sectors of the city, as some areas have traditionally served specific market segments.

The focus here is on the demand for new single family and duplex housing units. This development continues to account for most of the new housing activity in the city (Figure 20). It generally occurs in new suburban areas, and drives the demand for most new subdivision. This new subdivision, in turn, creates a need to extend and upgrade municipal infrastructure. As a result, the manner in which housing demand is distributed among the various sectors of the city affects the need for and timing of substantial expenditures by The City to service new growth areas.

The anticipated level of demand for new single family/duplex housing is provided in Figure 18. In 2001, there were 6,998 single family/duplex housing starts within the city, compared to 8,500 starts in 2002 (Figure 20). **It is expected that the demand for new single family/duplex units will add approximately 6,600 single family/duplex units in 2003, followed by an average of 6,100 units per year to 2007. This will result in an increase of approximately 31,000 new units (city-wide) between 2003 and 2007.** Figure 19 places this forecasted demand in the context of additions to the single family/duplex housing stock since 1988. Figures 20 and 25 detail housing construction activity over the past five years.

While most housing growth is occurring in new suburban areas, a small proportion (7% over the last five years, see Figure 33) of new single family/ duplex starts are located in existing, developed neighbourhoods. This occurs through single family infill/redevelopment in older inner-city communities, as well as construction on vacant lands remaining in various locations throughout the city (the distribution of the 2002 single family building permit applications is illustrated in Map 5). This percentage is monitored yearly by reviewing the previous five years history of where new units are located and used to assign the proportion of the new growth to the developing communities i.e., **93% of expected new home construction to go to the new communities** (see Figure 33).

This report is focused on the current developing communities (Map 2) and uses the background information within this report to help prepare a five year forecast for these same new suburban areas (Figure 33 and Map 7).

Forecasts combine single family and two family (duplex and semi-detached) housing units as their land needs and servicing requirements are generally similar.

With the exception of Figure 24 & 31, references to multi-family lots/units throughout the report refer to a combination of townhouses and apartments. In part, Figure 24 & 31 helps to show market share distributions of multi-family housing, particularly between developing communities in the suburbs and the remainder of the city. The market share is discussed in more detail in Section 7. Allocations of multi family by sector is difficult to predict in location, timing and amounts as Figure 31 shows and is not used as a predictable measure for land requirement needs. However, Map 7 Forecasted Suburban Growth does build in some of the additional land requirements to that of the single family/duplex land needs.

6 SUBURBAN RESIDENTIAL LAND REQUIREMENTS: 2003 - 2007

The demand for residential land for single family and duplex needs in the short-term is calculated on the basis of **an average density of 6.0 units per gross residential acre. This average is intended to provide a "generalized" calculation of land needs to accomodate the single family/duplex needs.** In actual growth allocations into the developing comunities a range of actual planned densities exist and is used in the allocations on Map 7 Forecasted Suburban Growth.

The monitoring of outline plans submitted between 1998 and 2001 for the suburban developing communities in Calgary (plans that Include multi family (apartment and town house) and single family/duplex) have averaged a density of 6.5 units per acre in that period. In any particular year the average has ranged between 6.0 unit per acre and 8.0 units per acre. This information is based upon proposed densities submitted by individual developers and will continue to be closely monitored so that estimated short-term land requirements can reflect current market conditions to the greatest extent possible. Map 7 attempts to place the expected forecast land requirements for both single family and multi family requirements within the developing communities.

Average densities in developing communities have increased since the mid 1990's. It is expected that demographic and market changes will lead to a gradual increase in the proportions of multi-family units and smaller houses/ lots being developed. This is already occurring in some communities and is consistent with policies contained within the *Calgary Plan*, encouraging innovative approaches in the design and development of new communities. This will prompt an increase in overall densities, in the variety of housing types, and in the capability for new housing to be integrated beyond the initial buildout of a community *(Calgary Plan 2-2.2.2B)*. The Calgary Plan endeavours to ensure that new communities will work, over time, to achieve a target overall density of 6 - 8 units per gross residential acre *(Calgary Plan 2-2.2.2C)*.

The density of individual communities varies, depending on the mix of housing types (i.e., the proportion of single family/duplex and multi-family units), single family/duplex lot sizes, and the extent of other land uses and amenities within the community, (e.g., local commercial sites, school sites, open spaces and transportation facilities). However, these variations are

Density = Number of Houses ÷ Gross Residential Area

Sample Density Calculation

A sample community with 259 hectares (640 acres) of total land area, 37 hectares (91 acres) of non-developable lands, 43 hectares (106 acres) of regional land uses and 3,029 houses (or any kind of dwelling unit), would result in a housing density of 17 units per hectare (7 units per acre).

GROSS TOTAL AREA (total land area of community)	259	hectares
Less: NON-DEVELOPABLE LANDS	37	hectares
Equals: GROSS DEVELOPABLE AREA	222	hectares
GROSS DEVELOPABLE AREA	222	hectares
Less: REGIONAL LAND USES	43	hectares
Equals: GROSS RESIDENTIAL AREA	179	hectares
Number of Houses	3,029	houses
Divided by GROSS RESIDENTIAL AREA	179	hectares
Equals: **DENSITY**	17	UPH
or	7	UPA

Non-developable Lands include: *(figures for sample density calculation only)*

Environmental Reserve	20	
Railways	4	
Expressways, TUC, ROW's	8	
Other	5	
	37	hectares

Regional Land Uses include:

Senior High School Sites	6	
Major Commercial Centres >7 acres	11	
Regional Open Space	8	
Industrial	3	
Lakes	5	
Major Institutional Site(s)	6	
Other Regional Uses	4	
	43	hectares

Gross Residential Area includes:

Single Family Residential	93	
Multi-Family Residential	4	
Local Commercial	5	
Elementary & Jr. High Schools & Sites	7	
Local Open Space	18	
Wet Dry Ponds & Public Utility Lots	1	
Church Sites	1	
Daycare Centres/Community Halls	1	
Small Indoor Recreation Site(s)	1	
Small Site Fire and Police Stations	1	
Local Roads & Lanes	47	
	179	hectares

site-specific and, in terms of their impact on overall land requirements, should not affect the expected timing of utility extensions at the sector level.

Figure 18 provides a breakdown of the annual land requirements **(city wide demand)** associated with forecasted housing demand using a range of density averages through to the year 2007.

- Between 6,700 and 7,200 gross residential acres of land will be required between 2003 and 2007 to support total city wide unit development or approximately 1,300 to 1,400 acres per year.

- Approximately 4,800 acres is expected to develop into these new suburban areas for single family and duplex land needs (Figure 33).

- Roughly 93% of the single family & duplex and 41% of the multifamily is expected to go to the new developing suburban communities (Figure 31 & 24).

Sections 7 and 9 of this report describe the manner in which the demand for serviced land has been distributed in the past. Figures 33 to 35 provide estimates of the distribution of housing construction and land absorption, by sector, through the five year forecast period.

7 INDICATORS OF MARKET SHARE, BY SECTOR

BUILDING PERMIT STATISTICS

Building Permit figures are used to indicate the increase in dwelling units in developing communities and provide one indicator of past market performance. The distribution of this unit increase over the last five years, by sector, is provided in the upper portion of Figure 24. The delineation of sectors is illustrated on Map 1.

With respect to single family/duplex new building permits, the Northwest, North and South sectors have been the city's strongest growth areas over the past five years. In combination, these three sectors have accounted for roughly 61% of the new suburban single family/duplex market since 1998. The north half of the city (North, Northeast, and Northwest) has captured 58% of the housing market in the last five years where the south half (South and Southeast) of Calgary has captured 28%. The West had 14% and the East 1%. In recent years some of the sectors have seen a shift in market shares as new areas have opened up while others such as the East, have virtually no supply remaining. The West sector share has been increasing since 1998 with the development of new communities.

The share of total suburban single family/duplex growth achieved in each sector, from 1998 to 2002, is illustrated in Figure 25. The distribution of market share for 2002 is shown in Figure 26.

For multi-family (including apartments and row housing), the South, Northwest and West sectors have continually shown the highest concentration of development , together they accounted for roughly 64% of the new suburban multi-family market since 1998. The Northwest at 25%, the South at 23% and the West at 16% continue to accommodate significant proportions of this development. However, it is important to note that multi-family market shares tend to be less predictable with regard to sector locations than single family.

BUILDING PERMIT APPLICATIONS

Market share in the short-term is probably best reflected in the distribution of recent approved building permit applications for new units.

Much of the information presented compares the developing communities relative to the full sector as most of the new growth continues to occur in the developing communities of the city. The communities that are considered to be developing are shown in Map 2.

Building Permit information (new units added) is used to provide the distribution of single family/duplex building permit applications for 2002 by each sector. The location of 2002 single family building permit activity is also illustrated on Map 5. (see also Figures 26, 27, 28 & 29).

The lower half of Figure 24 shows the market share distribution of building permits for multi-family housing units comparing the suburbs and the remainder of the city from 1998 - 2002. Comparisons are shown between development activity in the suburban sectors and the remaining Central sector, as well as between developing communities (i.e. those suburban communities currently experiencing significant construction of new units) and the remainder of the city.

When multi-family housing is defined as including duplexes, apartments and row housing, an average of 64% of new multi-family development occurred in the **suburban sectors** over the last five years: the remaining 36% occurred in the Central sector. Comparatively, an average concentration of 43% of this same mix of unit types was located in **developing communities**, with the other 57% being developed in the remainder of the city.

The final comparison in Figure 24 removes duplexes from the multi-family unit mix over the last five years. The distribution between **developing communities** and the remainder of the city shows a 41% share within the developing communities for the period 1998 - 2002. Over the last few years that average has dropped from 43% (1997-2001) 45% (1996 - 2000) and 47% (1995 - 1999).

2003 DEVELOPER SURVEY

Each year The City of Calgary Urban Development Division, surveys the development industry to determine areas where individual developers anticipate undertaking development. The results of the most recent survey are contained in Figure 32. These lands are located, generally, on Map 3.

It is important to note that this distribution of market expectations reflects the unique circumstances in each sector with respect to the availability of

serviced land, and not necessarily the expectation of immediate housing construction. The timing and scale of servicing and subdivision expectations often relate to a slightly longer time horizon and may be more directly affected by marketing strategies of individual developers.

HOUSING STARTS

In 2002, there were 12,362 total housing starts in Calgary, of which 7,952 (64%) were for single family units. An additional 548 (4.5%) starts were for duplex units (Figure 20).

Single family/duplex units continue to dominate the new housing market on a city-wide basis. The multi-family share of new housing starts represented 31% of total starts in 2002, with construction starting on 3,862 new townhouse and apartment units. Multi-family growth has been steady, since 1998 (Figure 20 & 21).

Residential construction is expected to remain relatively stable at around 9,400 units per year over the next five years on average. Lower levels of net-migration, household formation, and a lower level of pent-up demand expected from 2003 to 2007, combined with possible higher interest rates, suggest construction activity in the housing sector may be estimated to be roughly 8,900 units per year by 2007.

SUBDIVISION ACTIVITY - OUTLINE AND TENTATIVE PLAN APPLICATIONS

Figure 14 illustrates the number of acres submitted for outline plan approval annually since 1990. A yearly average of 2,878 acres have been applied for over the five year period between 1998 and 2002. The year 2000 saw a high of 4,344 acres not seen since 1981 (4,482), while the last two years showed a healthy 3,026 acres in 2001 and 3,290 acres in 2002. Over the last five years there has been 14,393 acres or 58 sq. kilometres (22 sq. miles) applied for in outline plans.

The "Number of Lots" included in tentative plan applications have risen in 2002 to over 10,716 a level not seen since 1998. Figure 13 shows the number of lots submitted annually for tentative plan approval since 1990. In 1998, a 14 year high of 10,049 lots were applied for. In 1999, 7,307 lots (a steep decrease) were submitted for tentative plan approval.

Typically, Tentative Plans come on stream much closer to the actual building stage than do outline plans and act as a good indicator for development intentions.

8 LAND AVAILABLE FOR RESIDENTIAL DEVELOPMENT, BY SECTOR

Land considered available, as of April 2002, for residential development in the suburban market includes three types of land;

1) Vacant lots in new suburban communities.
2) Land in the process of being subdivided.
3) Those remaining lands which are, as yet, unsubdivided, but which are identified for future residential use.

The status of this supply changes constantly as approved lots are registered and serviced, as construction begins on vacant lots, and as plans are developed or amended. The intent here is to provide an accurate assessment of overall residential land supply, reflecting supply as of April 2002.

Servicing status in the developing areas of the suburbs changes constantly and the information shown within this document reflects the most current information available at the time of preparation of this report.

CURRENT SINGLE FAMILY / DUPLEX LOT INVENTORY

A detailed inventory was made by Planning & Transportation Policy of the current capacities of single family and duplex lots, both vacant and under construction, in the developing communities in April 2002. Approximately **10,773 vacant lots** existed at that time, **including those which were serviced and available to builders, as well as lots recently approved through tentative plans of subdivision that may or may not be serviced with shallow utilities in place.**

This inventory was down significantly compared to the April 2001 inventory, which totalled approximately 12,654 vacant single family/duplex lots. The supply can accommodate just under two years of residential growth given current and expected demand and does not account for unsubdivided lands.

The estimated suburban single family/duplex lot supply, by sector, is detailed in Figure 7. The distribution of vacant lots is illustrated in Figure 8.

VACANT RESIDENTIAL LOT INVENTORY (U.D.I.)

The Calgary Chapter of the Urban Development Institute (U.D.I.) also compiles a survey of vacant suburban residential lots which **may or may not have shallow utilities in place**. According to this survey in January 2003, there were approximately **9,247** vacant lots, The inventory between 1998 and 2002 has been relatively stable between 7,700 and 8,200 lots. The current year 2003 shows the highest number of lots available since 1991. (Figure 5 & 6)

It should be noted that the surveys between the City and U.D.I. do not necessarily match in context of the survey and the areas in which the surveys were done but is used as a indicator of supply capacity.

UNSUBDIVIDED RESIDENTIAL LAND SUPPLY

The current unsubdivided suburban residential land supply is indicated, by sector, in Figure 11. The distribution of that land supply is shown on Figure 10. **As of April 2002, there were an estimated 13,017 gross residential acres intended for residential and related uses. Given lot counts from approved outline and tentative plans for both single family/duplex and multi-family units, as well as density midpoints of Community Plans (to calculate potential units), these lands could accommodate approximately 85,438 new residential units, a 12 to 15 year supply given Figure 33 projected growth rates.** Map 4 shows the unsubdivided residential land supply for the entire city, while detailed maps of the residential land supply, by sector, are contained in Appendix II.

This inventory does **not** include large areas for which future land use policy has not yet been developed. These excluded areas are shown in Appendix II (Grey areas on the maps). They will continue to be excluded from the residential land inventory until policy plans are in place and/or more extensive technical analysis is undertaken to determine the likely developable residential components.

The lands included in the inventory are classified according to the availability or capacity of water and sewer (storm and sanitary) services, as this infrastructure must be in place before development can proceed.

Areas classified as **"Fully Serviced"** have "Utility Capacity in Place" and indicate that major utility services have either been installed or will be provided by the developers without further major City expenditures, although **the land is currently neither subdivided nor developed with on-site services**. This means that the lands have the capacity to handle

development. The two remaining classes describe lands with **some**, but not all, utility capacity in place **(Partially Serviced)** or lands having **no** capacity in place **(Unserviced)**.

In Appendix II, lands within each sector are mapped according to servicing status. These servicing maps **do not** take into account the availability of downstream transportation capacity, which is discussed throughout the text, nor do they indicate the costs to construct the required services. **It cannot be assumed that areas classified as "Partially Serviced" are necessarily less costly to service (including transportation infrastructure) than those areas considered "Unserviced." Their relative cost depends very much on the unique circumstances in each area. In light of this, the coding of these two categories should not be construed to imply the intended sequence of development.** Generally, servicing costs and attractiveness to the market have been the main determinants of when individual areas are brought on-stream. More specific information about servicing thresholds/budgets/constraints/sequencing will be provided through the *Accommodating Growth: A Framework For Coordinating Municipal Capital Investment* report.

As noted above, transportation requirements may impose a further constraint on development, but the extent of constraint may vary from situation to situation. Although the required transportation facilities may be substantial in some situations, there is a greater degree of flexibility in the timing of the expenditures. Transportation facilities are not generally required in their final form until substantial development has occurred. Notwithstanding this, it must be emphasized that some of the areas discussed below, while having all or some utility capacity in place, may also have major transportation constraints which affect their developability in the 2003–2007 period (refer to Section 9).

It should also be noted that although The City may not be responsible for constructing major servicing projects in areas with utility capacity in place, it will still need to budget for "oversize" costs associated with specific transportation and utility improvements constructed by individual developers. "Oversize" costs are recovered from developers and in the case of transportation costs, they are recovered by means of major road assessments upon new developments.

Finally, it is noted that this servicing analysis **does not** take into account the related need for other public facilities (e.g., recreation facilities, libraries, fire stations) or services (e.g., transit, police, fire, EMS, social services) also required to support growth in a specific area. More specific information about facilities and services will be provided through the *Accommodating Growth: A Framework For Coordinating Municipal Capital Investment* report.

"FULLY SERVICED": AREAS WITH UTILITY CAPACITY IN PLACE

With the exception of the East sector, a supply of land exists in each sector which is immediately developable, with capacity in the system to develop

with water and sewer (storm and sanitary) facilities in place. These areas are shown in **"green"** on the maps included in Appendices I and II.

These lands are not, as yet, subdivided, nor do they have local "on-site" services in place. There is, however, capacity in the utility "system" to accommodate their development without requiring significant City expenditures for major trunks, watermains, reservoirs, etc. In this sense, they are considered to be "Fully Serviced" with utility capacity in place. Of these areas, those with specific transportation system constraints are identified in Section 9.

These areas represent approximately 7,598 acres, of which 304 acres are identified for multi-family use. **In total, areas with utility capacity in place in 2002 could accommodate approximately 45,500 single family/duplex units and 6,400 multi-family units, in other words a six to eight year supply of residential growth.** (See Figures 9, 10 and 11.)

Although each of these areas, in isolation, could develop without major expenditures for water and sewer lines, **the cumulative effects of simultaneous development in all of these areas could result in a need for improvements in the facilities.** Additional capital projects (treatment plants, reservoirs, etc.) will be required to meet increases in city-wide service demands as the city grows. **Full development of many of these areas <u>may</u> also require major transportation improvements and provision of a variety of necessary public facilities and services.** It is intended that these cumulative requirements will be identified and monitored through the *Accommodating Growth: A Framework For Coordinating Municipal Capital Investment report* process.

"PARTIALLY SERVICED": AREAS HAVING SOME UTILITY CAPACITY IN PLACE

In the areas considered as "Partially Serviced" some utility capacity exists (identified in **"yellow"** in Appendices I and II), and some **capacity exists in at least <u>one</u> major municipal utility (storm sewer, sanitary sewer or water).** In each instance, additional capital expenditures are required by The City before large-scale development can commence. **The areas designated as "Partially Serviced" total approximately 3,593 acres and could accommodate approximately 21,100 units.** The full development of many of these (yellow) areas, on a sector basis, will require major transportation expenditures.

"UNSERVICED": AREAS HAVING NO UTILITY CAPACITY IN PLACE

The third category of lands (shown in **"red"** in Appendices I and II) includes all of the remaining unsubdivided lands which are identified through Policy Reports, Area Structure Plans and Community Plans (either approved or in preparation), and are identified in *The Calgary Plan*, as being suitable for future residential land use. **These lands represent approximately 1,826 acres in total and could accommodate approximately 12,444 units.** The full development of these areas <u>may</u> require major transportation improvements.

9 PROBABLE SUPPLY/DEMAND CONDITIONS, BY SECTOR

The purpose of this report is to examine, on an annual basis, the expected fit between residential land demand and supply over the coming five year period. **The intent is to identify whether a sufficient supply of readily developable land exists, in a variety of locations, to facilitate competitive land and housing markets.** The comparison of supply and demand is based upon a set of assumptions regarding the level of population growth, the character of housing demand and the expected distribution of that demand among the competing growth corridors. As the market changes, these assumptions can be expected to change as well.

Section 7 of this report provides a basis for estimating the expected market share of single family/duplex housing starts in the short-term, although **it is recognized that major shifts in activity can and do occur from time to time as a result of individual developers opening up or completing particular subdivisions.**

Figure 33 provides estimates of the number and distribution of new single family/duplex starts, by sector and for the developing communities, over the 2003–2007 period. This distribution, by sector, is illustrated in Figure 34. Figure 35 estimates the annual demand for residential land, in each sector, and relates these demand forecasts to the existing inventory of unsubdivided lands considered "Fully Serviced". Supplementary information related to the rate of development, land supply, and remaining housing and population capacity within the individual communities in each sector is contained in Appendix II. Since much of this document deals with the new developing growth areas, information specific to these areas is provided throughout this document.

Map 7 provides an overall view of the possible distribution of both housing growth (approximately 28,800 single family/duplex and up to 6,500 multi-family units) and population growth within developing areas over the next five years, based on the assumptions and forecasts outlined in this report. It also recognizes the importance of areas where strong developer competition exists and is considered as a factor in the allocations of land needs. Actual locations may and do vary. The colours denote general development patterns of which the specific timing of development is not certain.

- It should be recognized that **this report does not address the downstream transportation impacts generated by suburban growth**. Many downstream intersections are currently at capacity and failing during peak periods.

NORTH

EXISTING SUPPLY:

All communities in the North sector accounted for a 17% share of the new single family/duplex market share since 1998, with recent development occurring mainly in Coventry hills, Panorama Hills, Country Hills Town Centre, and Hidden Valley. This added 1,130 units (family/duplex) per year to the sector from 199[illegible] to 2002.

In the year 2002 the sector accounted for 16% of the growth up from 13% in the year 2001 adding just over 1,360 single family/duplex units based upon building permit applications.

(Information relating to this is found on Figures 24, 25 & 26.)

As monitored in April 2002, the sector had an inventory of 2,138 vacant single family/duplex lots and 1,916 acres of land considered "Fully Serviced" with utility capacity in place. This would accommodate approximately 11,300 single family/duplex units and could provide up to a 10-year supply of land for residential growth.

(Information relating to this is found on Figures 7, 8, 9 & 11)

DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

Servicing solutions introduced this past year have allowed for additional large areas of Coventry Hill, Panorama Hills, Evanston and Symons Valley to become "Fully Serviced." This capacity as well as the continuing building out of the Northwest Sector and its diminishing supply of land should benefit the North in its future growth.

Past market share for this sector had been as high as 24% in 1997 and as low as 14% in 2001. The year 2002 saw the sector rebound to 16% of the total new units added relative to the other developing sectors of the city. Some of this increase is the result of the market competition between various developers in the area and the choice now available with the new lands of Symons Valley and Evanston but also from the movement of some of the growth from the Northwest Sector to the North. We have seen the Northwest Sector's share drop from 27% in 2001 to 24% in 2002, while at the same time the North Sector's share went from 14% to 16% in the same period.

The fastest growing community in 2002 in this sector was Panorama Hills with 536 new single family/duplex units added through building permit applications. This community saw the third highest number of units added in comparison to all Calgary's suburban developing communities.

An expectation for the area is for market share increases as the Northwest Sector continues to build out. The continuing drop in capacity in the Northwest will see more of the sector's shares move into the North and other sectors. Market shares are predicted to rise annually from 18% in 2003 to 22% by 2007 for an average over the five year forecast period of 20%. This would add over 5,750 single family/duplex units and require a minimum of 960 acres of land.

Single Family/Duplex to the Developing Communities Forecast										2003 - 2007		
2003		2004		2005		2006		2007		Average	Total	Total
%	Units	%	Units	%	Units	%	Units	%	Units	Share (%)	Units	Acres
18%	1,100	19%	1,110	20%	1,130	21%	1,190	22%	1,220	**20%**	**5,750**	**960**

INFLUENCING FACTORS:

- Stoney Trail will be built by the Province as a four lane roadway between Country Hills Boulevard and Deerfoot Trail by 2010.
- Improvements to McKnight Boulevard between Edmonton Trail and 4 Street West from four to six lanes in 2005-2010.
- Improvements to 16 Avenue North between 6 Street and 10 Street West from four to six lanes in 2003 -2005.
- Access to the area should remain relatively good, due to the 1999-2000 provision of upgraded road infrastructure such as widening of Country Hills Boulevard. The interchange at Deerfoot Trail and Country Hills Boulevard supports substantial traffic and has experienced significant delays. The Province is currently undertaking construction to improve the interchange and the completion date is Spring 2003. This includes twinning the existing bridge and two loop ramps.
- Beddington Trail/Symons Valley Road will provide the primary road access to the Symons Valley community in the first few years of development.

NORTHEAST

EXISTING SUPPLY:

Communities in the Northeast sector (established and developing) accounted for a 14% share of the new single family/duplex market share since 1998, with recent development occurring mainly in Martindale, Taradale and Saddleridge. These communities added an average of 910 units (family/duplex) per year to the sector from 1998 to 2002.

In the year 2002 the sector accounted for 13% of the growth down from 16% in the year 2001 adding just over 1,120 single family/duplex units based upon building permit applications.

(Information relating to this is found on Figures 24, 25 & 26.)

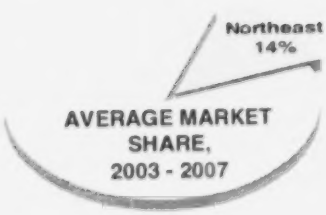
As monitored in April 2002, the sector had an inventory of 1,727 vacant single family/duplex lots and 796 acres of land considered "Fully Serviced" with utility capacity in place. This would accommodate approximately 5,470 single family/duplex units and could provide up to a 5-year supply of land for residential growth.

(Information relating to this is found on Figures 7, 8, 9 & 11)

DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

For a few years the Northeast Sector sustained a strong market share at 15%-16% in 2000 and 2001. In 2002 the sector dropped to its more historical levels of 14%. As indicated in last years report the higher levels were due to some pent up demand and an increase in "Fully Serviced" lands as a result of servicing improvements and some capacity restrictions in the North Sector. Now that some of these limitations have been resolved in that sector, the Northeast appears to be resuming its traditional share of growth.

The fastest growing community in 2002 in this sector was Taradale with over 551 new single family/duplex units added through building permit applications. Taradale had the second highest number of units added in comparison to all Calgary's suburban developing communities.



The Northeast is predicted to maintain a 14% annual market share to 2007 for an average over the five year forecast period of 14%. This would add over 4,040 single family/duplex units and require a minimum of 670 acres of land.

To accommodate this growth consideration should be given to the development of new Community Plans over the next five years. Figure 35 indicates the remaining capacity in the year 2007 at only 126 acres remaining for residential development.

Single Family/Duplex to the Developing Communities Forecast										2003 - 2007		
2003		2004		2005		2006		2007		Average	Total	Total
%	Units	%	Units	%	Units	%	Units	%	Units	Share (%)	Units	Acres
14%	860	14%	820	14%	790	14%	790	14%	780	14%	4,040	670

INFLUENCING FACTORS:

- Pressure on McKnight Boulevard has been eased with the completion of the new 96 Avenue NE connection from Deerfoot Trail to the Airport.
- Improvements to 36 Street NE from a two lane to a four lane road between McKnight Boulevard to 64 Avenue NE will be done in 2004-2005.
- McKnight Boulevard will be twinned to create a four lane road between 52 Street NE to 68 Street NE by 2005.
- The Northeast LRT will be extended two kilometres along 36 Avenue, from the Whitehorn station to the new proposed Prairie Winds station with construction in 2003-2007.
- Sour gas facilities may have a strong affect on the use, configuration and development of land in the sector.
- The upgrading of 32 Avenue NE from four lanes to six lanes between 12 Street NE and Barlow Trail is planned by 2010.

EAST

EXISTING SUPPLY:

All communities in the East sector accounted for a 1% share of the new single family/duplex market share since 1998. No significant development occurred since 1998 with this sector adding only 79 units (family/duplex) per year from 1998 to 2002. This sector remains essentially built-out with regards to new significant residential growth and has no existing planned residential capacity remaining.

(Information relating to this is found on Figures 24, 25 & 26.)

DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

Although no new communities have opened up in the East sector in the last few years, the area is still monitored in the possible case of new lands coming on stream through land use opportunities or annexation additions.

Single Family/Duplex to the Developing Communities Forecast										2003 - 2007		
2003		2004		2005		2006		2007		Average	Total	Total
%	Units	%	Units	%	Units	%	Units	%	Units	Share (%)	Units	Acres
0%	0	0%	0	0%	0	0%	0	0%	0	**0%**	**0**	**0**

INFLUENCING FACTORS:

- Twinning of 68 Street East from a two lane to four lane road between Memorial Drive and 17 Avenue SE in 2004.

SOUTHEAST

EXISTING SUPPLY:

All communities in the Southeast sector accounted for a 11% share of the new single family/duplex market share since 1998, with recent development occurring mainly in Douglas Glen, McKenzie Towne, New Brighton, Copperfield and Cranston. This added 796 units (family/duplex) per year to the sector from 1998 to 2002.

In the year 2002 the sector accounted for 13% of the growth up from 10% from the year 2001 adding just over 1,061 single family/duplex units based upon building permit applications.

(Information relating to this is found on Figures 24, 25 & 26.)

As monitored in April 2002, the sector had an inventory of 1,784 vacant single family/duplex lots and 1,914 acres of land considered "Fully Serviced" with utility capacity in place. This would accommodate approximately 12,630 single family/duplex units and could provide up to a 10-year supply of land for residential growth.

(Information relating to this is found on Figures 7, 8, 9 & 11)

DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

As expected the market share of the Southeast Sector has been increasing towards more traditional levels of growth to that of the mid 1990's when more communities were actively being developed. Now with four communities actively building and another soon to start up it is expected that the trend to a higher market share will continue.

Recovering from several years of lower than expected growth at 9% in 2000 and 2001, this sector achieved 13% of the single family/duplex market share in 2002. With ample lands with Community Plans in place and the Deerfoot Trail Freeway extension nearing completion, as well as a future major employment centre and future hospital, higher levels of growth can be expected. This being said the SE Sector has the potential to generate higher levels of market shares within the next few years.

From a servicing standpoint this sector has significant "Fully Serviced" land capacity at 1,914 acres and should meet residential demand to 2007 and beyond. However, shortages could occur within any individual community if development for the entire sector went to any one particular community.

The fastest growing community in 2002 in this sector was McKenzie Towne with 412 new single family/duplex units added through building permit applications. Comparing this community to the city's other developing areas it saw the seventh highest number of units added in comparison to all Calgary's suburban developing communities.

While the Southeast sector received 13% of the market share in 2002 it is expected to receive higher levels annually and up to 21% by 2007. Averaging 18% over the next five years. This would add over 5,110 single family duplex units and require a minimum of 850 acres of land.

Single Family/Duplex to the Developing Communities Forecast										2003 - 2007		
2003		2004		2005		2006		2007		Average	Total	Total
%	Units	%	Units	%	Units	%	Units	%	Units	Share (%)	Units	Acres
14%	860	17%	990	18%	1,020	19%	1,070	21%	1,170	**18%**	**5,110**	**850**

INFLUENCING FACTORS:

- New interchanges are operational and completed along Deerfoot Trail at Barlow Trail and Marquis of Lorne Trail.
- Two additional interchanges will be constructed by the Province along Deerfoot Trail at McKenzie Lake Boulevard (completion 2003) and 130 Avenue (completion 2004).

- The Province will extend Deerfoot Trail as a new four lane road south of Marquis of Lorne Trail to Highway 2 in 2003. An interchange will also be constructed at 196 Avenue. The City is cost sharing the south extension with the Province.
- The widening (two lane to four lane) of Glenmore Trail between 52 Street SE to East Freeway (Transportation/Utility Corridor) with anticipated completion in 2004.
- Marquis of Lorne Trail will be twinned between Deerfoot Trail and Chaparral Boulevard in 2004.
- Development of areas south of Marquis of Lorne Trail and east of the Deerfoot Trail extension will require interchanges on Deerfoot Trail at 196 Avenue SE.
- 52 Street East from Glenmore Trail to 130 Avenue South will go from two to four lanes in 2007-2008.
- Glenmore Trail from Ogden Road to the Bow River will be upgraded from four to six lanes in 2005-2007.
- 24 Street SE from Glenmore Trail to 90 Avenue SE will be rebuilt to a new four-lane roadway by 2010.

SOUTH

EXISTING SUPPLY:

All communities in the South sector accounted for a 17% share of the new single family/duplex market share since 1998, with recent development occurring mainly in Chaparral, Bridlewood, Evergreen, Millrise, Somerset, and Shawnessy. This added 1,120 units (family/duplex) per year to the sector from 1998 to 2002.

In the year 2002 the sector accounted for 15% of the growth down from 16% in the year 2001, 18% in 2000, and 1999. The last year added 1,223 single family/duplex units based upon building permit applications.

(Information relating to this is found on Figures 24, 25 & 26.)

As monitored in April 2002, the sector had an inventory of 1,355 vacant single family/duplex lots and 1,121 acres of land considered "Fully Serviced" with utility capacity in place. This would accommodate approximately 6,703 single family/duplex units and could provide up to a 6-year supply of land for residential growth.

(Information relating to this is found on Figures 7, 8, 9 & 11)

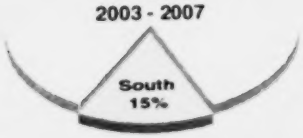
DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

Servicing solutions introduced this past year have allowed for additional areas of Bridlewood and Evergreen to become "Fully Serviced," increasing the sectors serviced supply to over 1,000 acres of unsubdivided capacity. The approval and construction of the 37 Street Bridge and upgrades in 2004 as well as the LRT extension to 146 avenue will help with supporting growth into this sector.

Market share for this sector has been declining since 1999. Some of this decline could be associated with the increases to the Southeast sector as these sectors often share market swings with one another. Also, the recently completed community of Millrise and the nearly completed Somerset and Shawnessy may have some impact on the loss in the competitive land base.

The fastest growing community in 2002 in this sector was Chaparral with 280 new single family/duplex units added through building permit applications. It is expected that Chaparral will be built out within the next five years leaving the communities of Evergreen, Bridlewood and a potentially new community south of Somerset as the sole developing communities in the sector.

AVERAGE MARKET SHARE, 2003 - 2007



Market shares are predicted to remain relatively consistent over the next five years. Annual growth is predicted to maintain a 15% share from 2003 to 2007 . This would add about 4,330 single family/duplex units and require a minimum of 720 acres of land.

Single Family/Duplex to the Developing Communities Forecast

2003		2004		2005		2006		2007		2003 - 2007		
%	Units	%	Units	%	Units	%	Units	%	Units	Average Share (%)	Total Units	Total Acres
15%	920	15%	880	15%	850	15%	850	15%	830	**15%**	**4,330**	**720**

INFLUENCING FACTORS:

- The construction of the 37 Street SW Bridge over Fish Creek is to occur in 2004. This will link Anderson Road and 146 Avenue in 2004. The road will be a four lane roadway.
- Anderson Road between 24 Street and 37 Street west will upgrade from two lanes to four lanes with anticipated completion in 2004.
- Improvements to 14 Street between 90 Avenue and Anderson Road will go from four lanes to six lanes in 2005. The construction of the 14 street/ 90 Avenue interchange is planned in 2010.

- The south LRT extension to 146 Avenue is complete, with the further extension to 162 Avenue to be completed in 2005.

- The upgrading of 162 Avenue SE from East of Macleod Trail (Sunpark Gate) to Shawville Way to a four-lane roadway with and intersection improvement is anticipated in 2004.

- Short-term growth in Chaparral will require a new intersection on Macleod Trail at 194 Avenue. The intersection is at the city limits and is controlled by the Province. The Province has approved a traffic signal at this location. Installation of signals and intersection improvements occurred in 2002.

- Upgrades along 14 Street between Anderson Road and Canyon Meadows Drive will provide four lanes by 2010.

- The Glenmore Trail and Elbow Drive interchange construction will occur between 2005 and 2007.

WEST

EXISTING SUPPLY:

All communities in the West sector accounted for a 14% share of the new single family/duplex market share since 1998, with recent development occurring mainly in Crestmont, Cougar Ridge, West Springs, Strathcona, Aspen Woods, Springbank Hill, Discovery Ridge and Signal Hill. This added 950 units (family/duplex) per year to the sector from 1998 to 2002.

In the year 2002 the sector accounted for 20% of the growth up from 17% in the year 2001, 15% in 2000, and 10% in 1999. The last year added 1,647 single family/duplex units based upon building permit applications.

(Information relating to this is found on Figures 24, 25 & 26.)

As monitored in April 2002, the sector had an inventory of 2,054 vacant single family/duplex lots and 671 acres of land considered "Fully Serviced" with utility capacity in place. This would accommodate approximately 3,145 single family/duplex units and could provide a 2 or 3-year supply of land for residential growth.

However, a water reservoir and significant water servicing upgrades are required in the area before the full development of this supply can be fully built out. Population thresholds that impact water availability currently exist in specific areas of the west sector which could have impacts on the amount and timing of near term housing growth.

(Information relating to this is found on Figures 7, 8, 9 & 11)

DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

Continued choice of communities and the amenities that this sector offers as well as the diminishing supply of growth opportunities in the Northwest sector has helped to contribute in increased growth in the market share for the West. With seven communities in which to locate, current development in this sector has risen to levels that have not been recorded in well over 15 years. Although it was expected that the west would continue to grow it was not predicted that it would obtain a 21% market share in 2002 or within a five-year period as recorded in last year's forecasts.

Past market shares for this sector had been traditionally at 7-10% of the market and have shown a continuing trend of increases from 10% in 1999 to 15% in 2000, 17% in 2001 and presently 21% in 2002. This growth was expected to continue with at a 15% share in previous forecasts. And it is felt that the current high growth is not sustainable over the next five years.

The complications to predicting a continued high forecast is that much of this sectors land supply has multiple small parcel ownership and fragmented areas that could slow growth to levels below the 2002 high. **As well, there are water servicing limitations that require a reservoir to be built in the next few years that may also impact the allowable growth in this area.** The market share given may not be reached if servicing solutions and land fragmentation (ownership) issues are not resolved within the next few years. For these reasons forecasts shown in Figure 33 will be more moderately predicted at 16% over the next five-year period.

The fastest growing community in 2002 in this sector was West Springs with 481 new single family/duplex units added through building permit applications. West Springs had the fourth highest number of units added in comparison to all Calgary's suburban developing communities. A close second was the community of Cougar Ridge at 358 units and it was the eighth fastest community in comparison to the rest of the city's developing communities.

An expectation for the area is for market share to decrease to more moderate growth and sustain a lower level over the next five years. Part of this sustained growth is in part explained by the capture of some of the Northwest sectors market share as that sector continues to build out and its capacity is reduced. Market shares are predicted to decline from 21% in 2002 to an average of 16% from 2003 to 2007. This would add 4,660 single family/duplex units and require a minimum of 780 acres of land.

Single Family/Duplex to the Developing Communities Forecast

2003		2004		2005		2006		2007		2003 - 2007		
%	Units	%	Units	%	Units	%	Units	%	Units	Average Share (%)	Total Units	Total Acres
18%	1,100	16%	930	16%	900	16%	900	15%	830	**16%**	**4,660**	**780**

INFLUENCING FACTORS:

- The upgrading of 69 Street SW to a major standard road from Highway 8 to 34 Avenue SW is complete.
- The City has constructed the extension of Bow Trail from Old Banff Coach Road to 85 Street NW. Old Banff Coach Road west of 69 Street SW is being upgraded.
- Glenmore Trail will be widened from a four lane road to a six lane road at 37 Street S.W. between 2004-2005.
- Glenmore Trail will be widened from a two-lane road to a four-lane road between Sarcee Trail and 101 Street West in 2004.
- Improvements to Sarcee Trail and 17 Avenue SW intersection is anticipated by 2010.

NORTHWEST

EXISTING SUPPLY:

All communities in the Northwest sector accounted for a 27% share of the new single family/duplex market share since 1998, with recent development occurring mainly in Edgemont, Hamptons, Citadel, Arbour Lake, Royal Oak, Rocky Ridge, Tuscany, and Valley Ridge. This added 1,813 units (family/duplex) per year to the sector from 1998 to 2002.

In the year 2002 the sector accounted for 23% of the growth down from 27% in the year 2001 and down from a consistent share between 25% and 29% annually over the last 10 years. This sector added 1,960 single family/duplex units based upon building permit applications in 2002.

(Information relating to this is found on Figures 24, 25 & 26.)

As monitored in April 2002, the sector had an inventory of 1,715 vacant single family/duplex lots and 1,180 acres of land considered "Fully Serviced" with utility capacity in place. This would accommodate approximately 6,280 single family/duplex units and could provide between 3 to 5 years supply of land for residential growth until the sector is completely built-out.

(Information relating to this is found on Figures 7, 8, 9 & 11)

DEMAND ASSUMPTIONS: DEVELOPING COMMUNITIES

Historically the strongest growth corridor or sector of the city, the north is now showing signs of a decreasing market shares as evident by the 2002 decline to 21%. This sector achieved a consistent 26% to 29% of the market over the last 10-15 years. With no major additional lands to come available (with the possible exception of annexation) this sector should start to see a significant further decline in the total growth share. The sector presently has just over 1,100 acres of residential developable land remaining and the communities of Arbour Lake, Citadel, Hamptons, Valley Ridge, should be built out in the next year or two. This reduction in the choice of areas will leave Tuscany, Rocky Ridge and Royal Oak as the only communities available for development to 2007.

Past market share for this sector had been as high as 29% in 2000, 27% in 2000, and 21% in the year 2002. The decline in the Northwest sector has moved growth into the North sector and West sector and is reflected in the increases in those areas over the last year.

The fastest growing community in 2002 in this sector was Tuscany with 585 new single family/duplex units added through building permit applications. Comparing this community to the city's other developing areas it was the number one community showing the highest number of units added.

Expectations for the sector are for a decreasing market share as the Northwest sector continues to build out. The continuing drop in capacity in the Northwest will see more of the sectors shares move into the North sector and West sectors. Market share is predicted to decline annually from 21% in 2003 to 13% by 2007 for an average over the five year forecast period of 17%. This would add 4,920 single family/duplex units and require a minimum of 820 acres of land.

Single Family/Duplex to the Developing Communities Forecast										2003 - 2007		
2003		2004		2005		2006		2007		Average	Total	Total
%	Units	%	Units	%	Units	%	Units	%	Units	Share (%)	Units	Acres
21%	1,280	19%	1,110	17%	960	15%	850	13%	720	**17%**	**4,920**	**820**

INFLUENCING FACTORS:

- Crowchild Trail will be widened from four lanes to six lanes between 53 Street and Rocky Ridge Road in 2005 and 2006.
- Shaganappi Trail will be twinned from two lanes to four lanes between Country Hills Boulevard and Edgemont Boulevard in 2006.

- Stoney Trail will be built by the Province as a four lane roadway between Country Hills Boulevard and Deerfoot Trail by 2010.

- Stoney Trail will be widened from two lanes to four lanes between Tuscany Boulevard and Nose Hill DRive in 2003-2004.

- Sarcee Trail will be widened from two lanes to four lanes between Country Hills Boulevard and John Laurie Boulevard in 2003-2004.

- Construction is ongoing for the extension of LRT to 53 Street/Dalhousie Station, including a Park 'n' Ride lot. The construction of interchanges on Crowchild Trail at Brisebois Drive, Northland Drive and 53 Street NW is planned for 2001 and 2003.

- An agreement is in place to stage upgrading of Rocky Ridge Road from two to four lanes, and to construct Country Hills Boulevard from Rocky Ridge Road to Stoney Trail.

10 SERVICING IMPLICATIONS

THE NEED FOR UTILITY EXTENSIONS

The serviced residential land supply, that is, the existing inventory of vacant single family/duplex lots and the unsubdivided areas considered "Fully Serviced" with utility capacity in place (the green areas in Appendices I and II), together provide enough capacity for an estimated 56,300 single family/duplex units or approximately 164,000 to 174,000 people. **These lands should provide sufficient inventory to accommodate expected city-wide demand through the five year forecast period. However, there will be serviced land shortages in particular sectors within the next five years. Extension of City utilities will be required if these sectors are to continue developing.**

The timing of utility extensions is to be reviewed in the context of the policies contained in the Calgary Plan. The following specific policies provide the basis for this review:

- *The City will endeavour to accommodate growth while at the same time attempting to avoid premature investment in municipal infrastructure (2-2.2.2.1G).*

- *Make decisions on capital expenditures relating to the extension and/or upgrading of municipal water, storm, sanitary, and transportation systems, through the normal budgeting process and after consideration has been given to: the overall capital cost implications of the extensions, including*

  - *the cost of other services The City provides;*
  - *the municipality's financial capability;*
  - *existing market conditions and anticipated demand as they relate to the proposed expenditure; and*
  - *the impact of these decisions on the provision of gas, electric, telephone and cable services. (2-2.2.2.1I)*

- *Evaluate actual expenditure decisions related to the construction of municipal infrastructure through The City's Short-Term Growth Management decision-making process. (2-2.2.2.1H)*

The Short Term Growth Management Strategy (approved in February 1985) indicates that, through its normal planning and budgeting processes, The City will endeavour to incorporate sufficient lead times so that it can be in a position to construct the municipal infrastructure required to provide the supply of serviced land determined to be necessary under *Calgary Plan* policy 2-2.2.2.1l.

On the basis of the forecasts and allocations contained in this report, and **if** a reasonable supply of land considered "Fully Serviced" with utility capacity in place is maintained in each sector, The City should consider undertaking or facilitating utility extensions over the next five years in the following sectors:

Sector	Probable Year in Which Utility Extensions Will be Required	Utility Extensions Required to Service Areas Considered "Partial Serviced" (Yellow Areas)
North	After 2007	Water and Sanitary
Northeast	2007	Water
East	---	---
Southeast	after 2007	Storm
South	after 2007	Water, Storm, Sanitary
West	2003-2004	Water, Sanitary, Storm
Northwest	2004	Water

It cannot be assumed that "yellow" areas will be developed before "red" areas (areas with no capacity in place).

Notwithstanding the overall availability of serviced land, it is expected that requests to extend utilities and transportation services into new areas will continue to be made.

IMPLICATIONS OF THE "SERVICEABLE" LAND SUPPLY

In dealing with shortages of land supply in a particular sector, Council may or may not choose to expend funds to service new lands, given the availability of serviced land in other sectors. All scheduled budget information is tentative and subject to final City Council approval for each year's budget. In considering funding, the following implications should be taken into account.

- The development of those areas shown to have major utility capacity in place offers several benefits, including:

  - minimizing the assumption of new debt by The City in accommodating growth in the short-term (i.e., not contributing to an increase in the existing debt/capita ratio);

- reducing pressures on The City's operating budgets in terms of debt servicing and overall operating efficiencies and;

- On the other hand, limiting development to those lands having utility capacity currently in place may not satisfy all of the requirements of the marketplace with respect to:

  - providing a sufficient number of locational choices for each market segment;

  - providing a readily developable supply in each sector.

- In addition, there may be other factors which influence the need for, or the timing of, service extensions in particular areas and which are not strictly related to local demands for residential land. For example, specific service extensions may also satisfy demands for non-residential uses, such as industrial development, or resolve existing servicing problems in the sector.

It is within the context of these divergent interests that The City's growth management processes must:

- provide a context for setting the budgeting priorities of each service department in relation to a shared view of the development pattern expected to emerge over the coming five year period; and

- provide current information upon which Council can respond to the requests of individual landowners situated beyond the fully-serviced areas.

The Short-Term Growth Management Strategy provides mechanisms through which Council can balance these varying interests in a consistent and rigorous way. The City also anticipates requests from individual developers to extend services to new areas. *Accommodating Growth: A Framework for Coordinating Municipal Capital Investment* outlines the protocol for evaluating these requests through the policy plan and outline plan processes and the Growth Management Technical Team and Steering Committee when required.

This Strategy also serves as the basis for developing cost-sharing agreements on the extension of services into new areas. Specifically, cost-sharing arrangements between The City and developers have been approved for:

- Country Hills Boulevard NW extension;

- Harvest Hills (transportation improvements);

- Panorama Hills (transportation improvements at Country Hills Boulevard/ Deerfoot Trail interchange);
- Martindale (sanitary and storm sewers);
- McKenzie Lake and McKenzie Towne (sanitary and storm sewers);
- Shawnessy/Somerset (storm sewers and transportation);
- Patterson Heights (sanitary and storm sewers);
- Strathcona Cell H (sanitary and storm sewers);
- Arbour Lake (storm sewers);
- Crestview (waterworks);
- Crowchild IV/Hamptons (transportation improvements);
- Rocky Ridge (sanitary and storm sewers and transportation);
- Valley Ridge (sanitary sewers and transportation);
- West Scenic Acres/Tuscany (sanitary and storm sewers and transportation improvements); and
- Royal Oak (waterworks).
- 37 Street Bridge & related upgrades (transportation and storm sewers)
- Symons Valley (sanitary)
- North Beddington (storm sewer)

SERVICING IMPLICATIONS BY SECTOR

This section briefly describes the major **utilities needed** to service future residential development in each sector (the "yellow" and "red" areas shown on Maps 1 to 7 in Appendix II). Notwithstanding the identification of these infrastructure requirements in this report, there is no assurance that individual elements will actually be constructed in the short-term, as a result of capital funding constraints.

NORTH SECTOR

Coventry Hills and Panorama Hills:

Sewers:

- Wastewater has budgeted for 2003 and 2004 to pay back the developer for the upgraded storm sewer. The alignment has been finalized and financing arrangements are completed.

- Full development of the "green" areas in Panorama Hills requires extension of the North Beddington Sanitary Sewer Trunk by the developer in 2003-2004 and completion of the storm sewer upgrade described above

Waterworks:

- Ultimate development of the "green" area in Panorama Hills will require feedermain extensions on 4 Street and 144 Avenue NW.

Symons Valley:

Sewers:

- Wastewater has budgeted to pay back the developers for construction of the Beddington Creek 2 Sanitary Trunk and a lift station. Lift station and trunk extension across the Transportation and Utility Corridor has been completed. Sanitary trunck extentions will be financed by the developers under an agreement with the City.

- Stormwater drains to West Nose Creek, with storm water retention facilities and pipes being constructed by developers.

Waterworks:

- Servicing of the westerly portions of Symons Valley, above the 1,190 m contour (Top Hill and Nose Hill pressure zones), can occur through distribution main extensions across the Transportation/Utility Corridor (TUC).

- A feedermain extension on Symons Valley Road will be required to support development along the western edge of the Spy Hill Pressure Zone.

- The area above the 1148 m contour (Big Hill Pressure Zone) requires a feedermain extension on Sarcee Trail and a reservoir near the city limits to the north.

North Sector Overall:

- Long-term growth in the North and Northeast Sectors will require construction of a reservoir on the western edge of Nose Hill Park, in conjunction with the phased extension of the Shaganappi Trail Water Feedermain between the Big Hill Pump Station and the Beddington Reservoir.

NORTHEAST SECTOR

Waterworks:

- The 60 Street NE Feedermain (Phase 1) is planned for construction as development extends to the North (construction to time with the phasing of new housing development). The 60th Street NE Feedermain (Phase 2) will be constructed in 2007).

Sewers:

- The Northridge-McDonald Trunk is budgeted for 2005 and will service lands between Nose Creek & Deerfoot Trail as well as lands east of Deerfoot Trail and north of 96 Avenue NE.

EAST SECTOR

East Sector Overall:

- No further additions to the residential land base are expected for this sector in the short to medium-term.

SOUTHEAST SECTOR

McKenzie Towne:

Sewers:

- Build-out of portions of the area will require extension of a sanitary sewer trunk as part of the proposed New Brighton and Copperfield subdivisions (funds are budgeted for 2004 & 2006). Servicing will be via lift station pumping back to the McKenzie Trunk. Only portions of these subdivisions will be approved for development until such time as the Shepard storm system is available (wetland physically constructed). Financing arrangements with Wastewater may be required to be negotiated.

Cranston:

Sewers:

- Full development of the area will require storm and sanitary infrastructure.
- A Sanitary Syphon is budgeted for 2007 and 2011.
- The developer funded sanitary trunk for this area will be directed to the future Pine Creek Wastewater Treatment Plant (Phase 1) which is expected to be operational by 2007.

Waterworks:

- Full development of the area will require water transmission (City supplied main feedermains) system improvements, including feedermain extensions, a new reservoir, a flow control station and a new pump station.

Southeast Cell A (East of Cranston):

Sewers:

- Initial development of the area requires storm and sanitary infrastructure.

Southeast Sector Overall:

- Pine Creek Wastewater Treatment Plant will be designed in 2004 and construction will occur between 2005-2007. The Pine Creek Sanitary Trunk from the Fish Creek Wastewater Treatment Plant will run on the west side of the Bow River and is expected to be completed on the same schedule as the plant. The syphon under the Bow River to Cranston is required for all future lands in this area.

SOUTH SECTOR

Chaparral:

Waterworks:

- The Macleod Trail Feedermain Phase 1, servicing growth in Chaparral and located between Sun Valley Boulevard and Chapalina Crescent S.W., is budgeted for construction in 2007. This is required to reinforce the distribution network in the Chaparral area.

Somerset, Bridlewood, Evergreen:

Sewers:

- The area will require extension of the Midnapore Sanitary Sewer Trunk along 162 Avenue SW to 24 Street SW.

- A new storm trunk will be required to service the Fish Creek / 37 Street Storm Catchment. Financing arrangements between the developer and Wastewater may be required.

- The area will also require the extension of a new storm outfall to Fish Creek, subject to Provincial approval and resolution of financing. Wastewater have tentatively budgeted to construct the Fish Creek / 37 Street Storm Trunk in 2006.

- The new Community Plan being prepared for the area known as Silverado will require a trunk from Pine Creek Water Treatment Plant before full development of the area.

Waterworks:

- The Evergreen Ridge pump station can service a population of 13,000 between the elevation of 1,108 and 1,146 (Westview Pressure Zone). Ultimately a feedermain and reservoir will be required to serve the built out Westview pressure zone.

- Development in the southern parts of the Westview Pressure Zone, particularly south of 162 Avenue, will require looped distribution mains extended from the Evergreen Ridge Pump Station. These extensions will be built at developers cost.

- Growth in this sector, west of Macleod Trail will require an additional reservoir cell at the Lower Sarcee Reservoir site to reinforce the Lower Sarcee Reservoir District. Waterworks plans to construct the Lower Sarcee Reservoir in 2003.

- A water feedermain to be located on James McKevitt Road S.W., within the Lower Sarcee pressure zone, will be required for further development to the south. The first phase of the feedermain is scheduled for 2003.

South Sector Overall:

- Pine Creek Wastewater Treatment Plant will be designed in 2004 and construction will occur between 2005-2007. The Pine Creek Sanitary Trunk from the Fish Creek Wastewater Treatment Plant will run on the west side of the Bow River and is expected to be completed on the same schedule as the plant. Servicing any future lands in this area requires the trunk presently budgeted for 2008 and 2011.

WEST SECTOR

Calgary West & Cougar Ridge:

Waterworks:

- A water feedermain extension, across the Bow River, is required to extend south into Calgary West. A new reservoir with a pump station is required to provide service between the 1,209 m contour and the 1,248 m contour (Broadcast Hill Pressure Zone). Above 1,248 m, requirements for water servicing have not been determined.

- Waterworks plan to construct the Old Banff Coach Road Feedermain Phase 1 in 2003 and 2004.

West Springs, Aspen Woods, Springbank Hill, Discovery Ridge:

Sewers:

- Wastewater have budgeted to payback developers for the construction of the 69 Street Storm Trunk in 2003.

- The storm sewer through Discovery Ridge to Highway 8 has been constructed. Alignment for storm and sanitary sewer in the 85 Street SW right-of-way north of Highway 8 has been finalized. Wastewater has allowed for the construction of the 85 Street Sanitary Trunk in 2003. Budgeting for this storm sewer is currently beyond the ten-year window

- The 101 Street SW catchment area will require a new storm trunk and other storm water management facilities.

Waterworks:

- The Broadcast Hill and Strathcona water pressure zones (above 1,169 m) can accommodate a total population of 28,000. Above 28,000 people, a reservoir is required to be located to the west of the existing City limits. This would require feedermains along Old Banff Coach Road. The 2002 Civic Census presently shows a population of 24,552 in these areas. This population threshold may, in specific areas of the west sector impact the amount and timing of near term housing growth and put limits on the continued development of housing until the reservoir is nearer to completion. Currently, expected construction for the reservoir is in 2004.

- The Glendale and West Calgary water pressure zones can accommodate development below the elevation of 1,169 m between 69 Street SW and the eastern edge of the major ravine in Sections 3 and 10 of Township 24, Range 2, west of the Fifth Meridian. Development west of this ravine will require connection to proposed existing transmission/distribution systems in the upper Broadcast Hill/Strathcona zones, including two Flow Control Stations. A feedermain extension on 69 Street and 17 Avenue to 85 Street will also be required.

NORTHWEST SECTOR

Rocky Ridge, Royal Oak:

Waterworks:

- A feedermain extension on 112 Avenue NW to the Top Hill Reservoir is required for ultimate servicing. Waterworks plans to construct the Research Park Feedermain in 2004.

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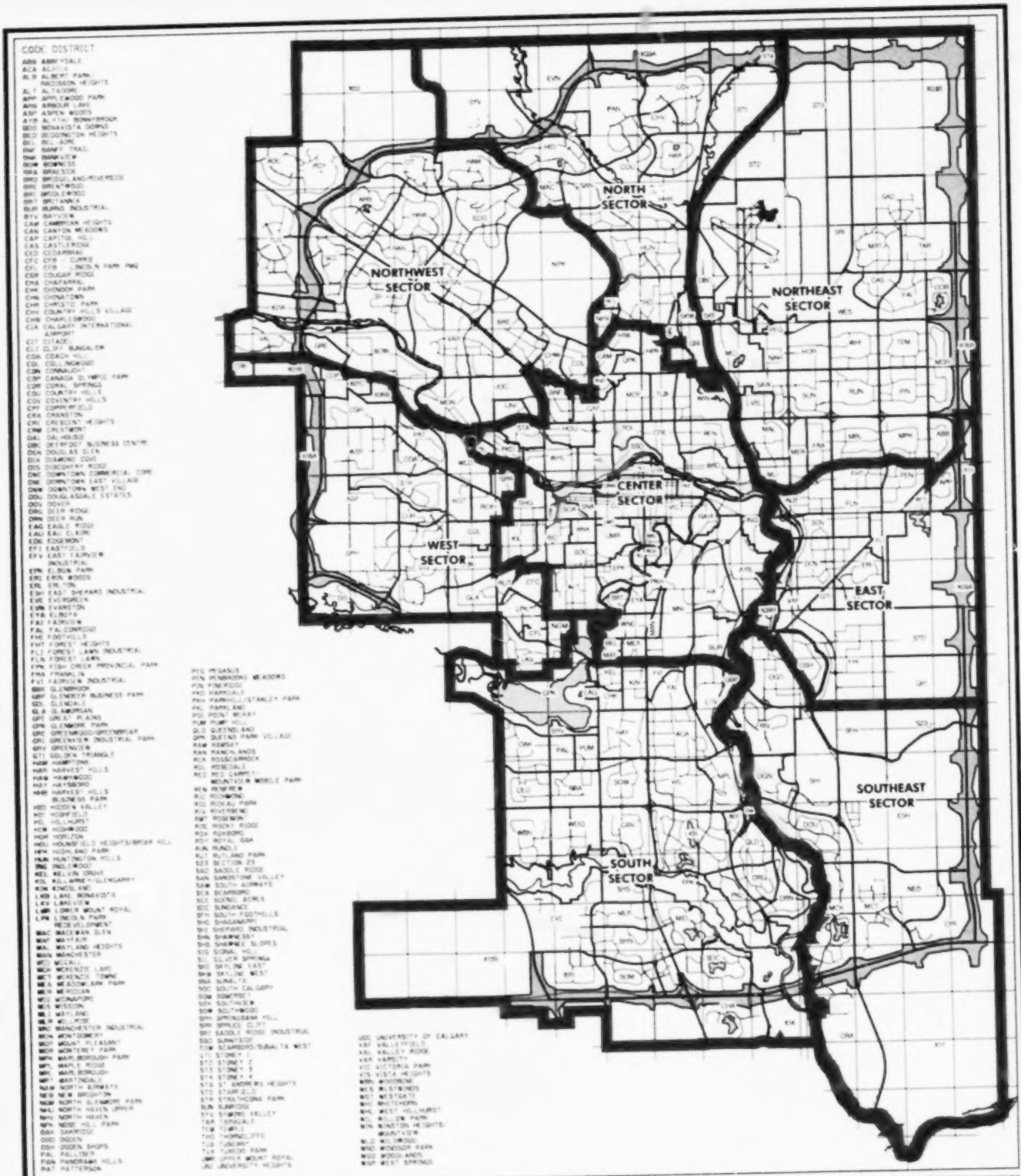

SUBURBAN SECTORS AND COMMUNITY DISTRICTS OF CALGARY – 2003

THE CITY OF CALGARY
PLANNING & TRANSPORTATION POLICY

SHORT-TERM GROWTH MANAGEMENT STRATEGY

CITY-WIDE
MAP 1

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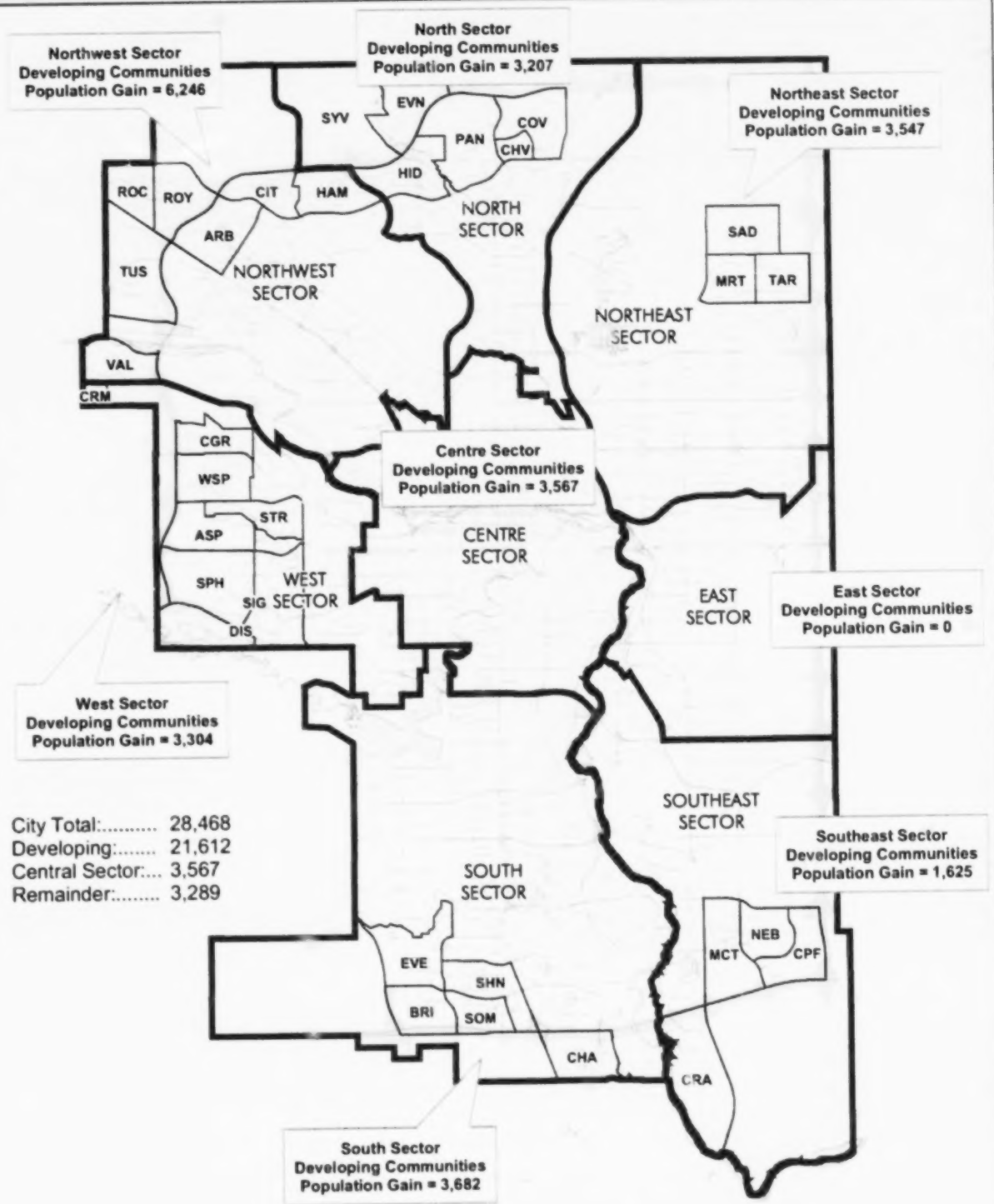

GROWTH IN DEVELOPING COMMUNITIES
2001 – 2002

THE CITY OF CALGARY
PLANNING & TRANSPORTATION POLICY

SHORT-TERM GROWTH MANAGEMENT STRATEGY

CITY-WIDE
MAP 2

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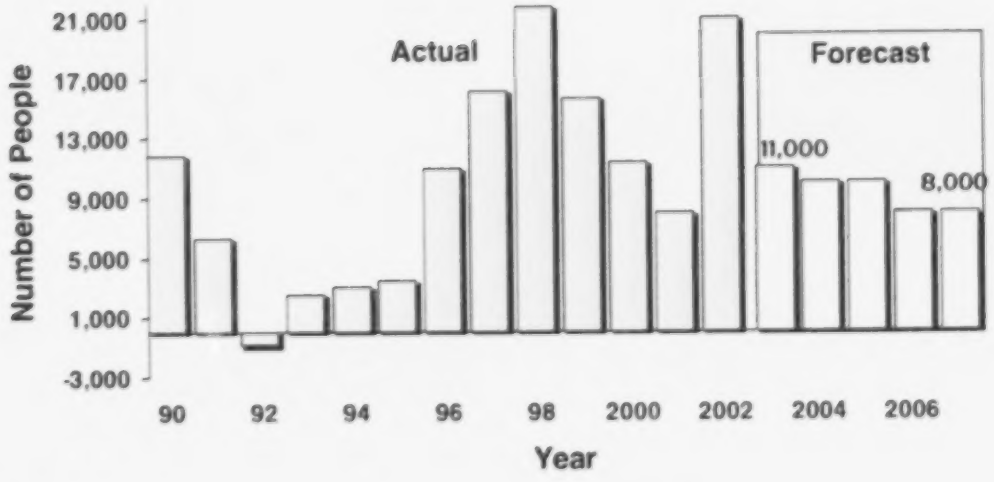
POPULATION

Figure 1 Short-Term Population Projections (2003-2007)

Year	Projected Net Migration	Projected Population
2002 (Actual)	20,962	904,987
2003	11,000	924,000
2004	10,000	942,000
2005	10,000	959,000
2006	8,000	974,000
2007	8,000	989,000
Total 2003-2007	47,000	84,013

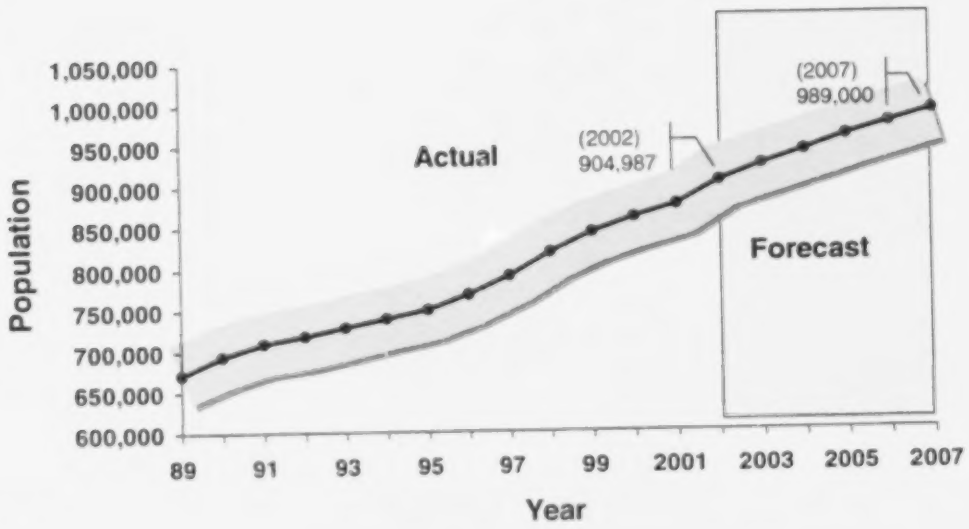
Source: Corporate Strategy & Economics 2003

Figure 2 Annual Net Migration for Calgary, Actual (1990-2002) and Forecast (2003-2007)



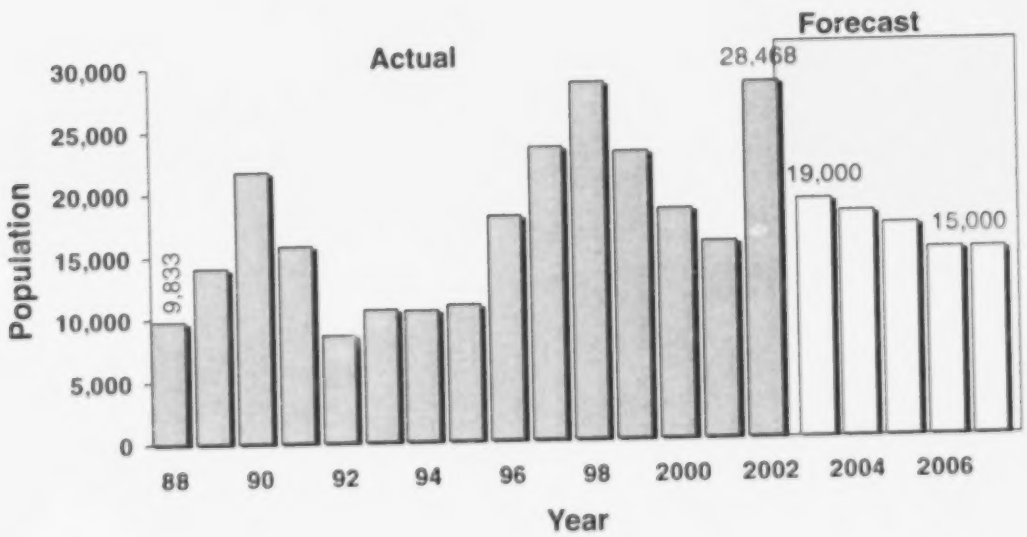
Source: Civic Census 2002, Corporate Strategy & Economics 2002 and 2003

Figure 3 **Recent and Forecast Population Growth for Calgary (1989-2007)**



Source: Civic Census 2002; Corporate Strategy & Economics 2003

Figure 4 **Annual Population Growth, Actual (1988-2002) and Forecast (2003-2007)**



Source: Civic Census 2002; Corporate Strategy & Economics 2002 and 2003

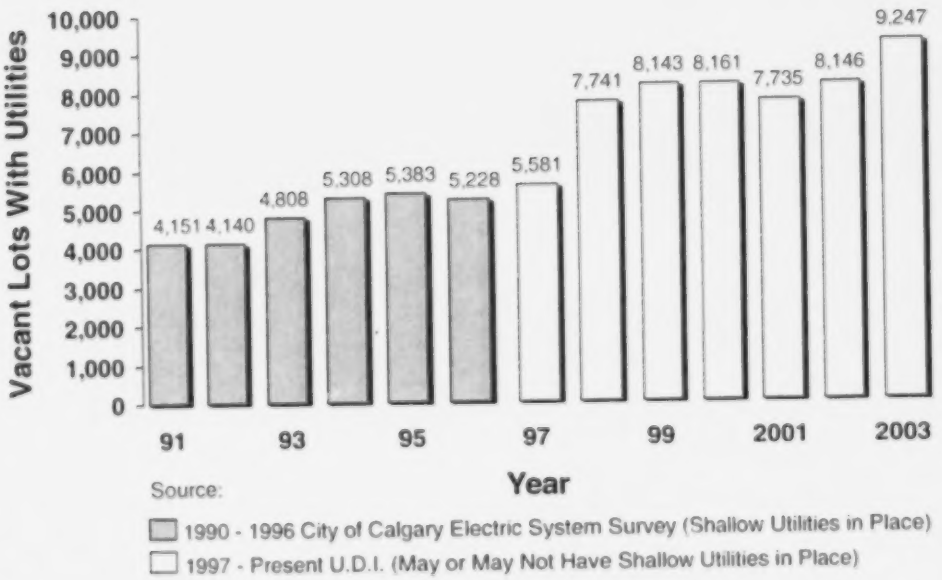
CAPACITY

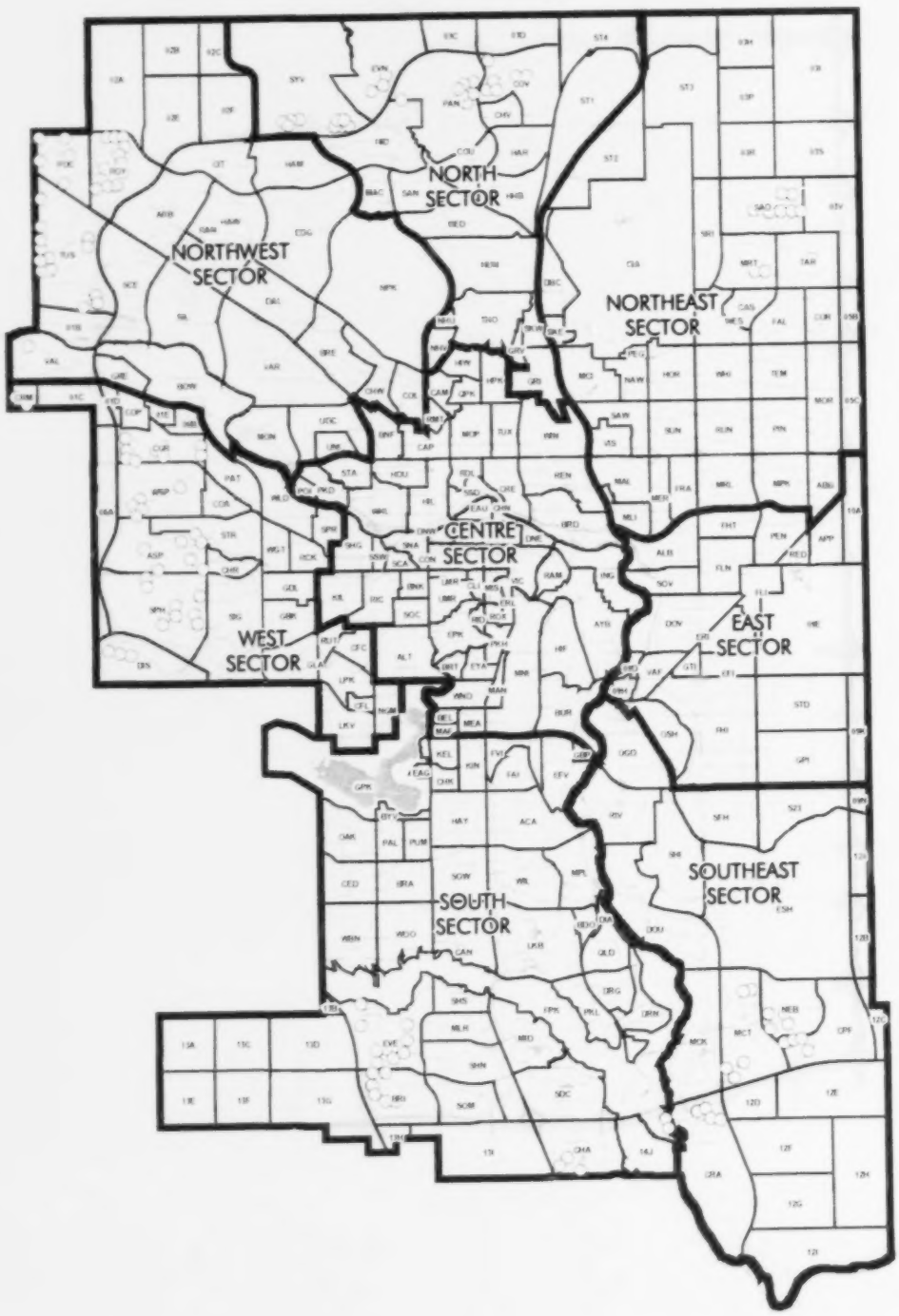
Figure 5 Distribution of Vacant Serviced Lots by Sector, (2001, 2002 & 2003)

Sector	2001 Vacant Lots	2001 %	2002 Vacant Lots	2002 %	2003 Vacant Lots	2003 %
North	767	10%	907	11%	951	10%
Northeast	877	11%	1,049	13%	1,337	14%
East	0	0%	0	0%	0	0%
Southeast	751	10%	967	12%	1,465	16%
South	1,173	15%	1,009	12%	1,282	14%
West	1,866	24%	2,131	26%	1,720	19%
Northwest	2,301	30%	2,083	26%	2,492	27%
Total Suburbs	7,735	100%	8,146	100%	9,247	100%

Source: Urban Development Institute (U.D.I.) Survey February 2001, January 2002, and January 2003

Figure 6 Vacant Lot Survey, Enmax and The Urban Development Institute (1991-2003)





2003 DEVELOPER SURVEY

AREAS IN WHICH DEVELOPERS HAVE INDICATED ANTICIPATED DEVELOPMENT ACTIVITY

THE CITY OF CALGARY
PLANNING & TRANSPORTATION POLICY

SHORT-TERM GROWTH MANAGEMENT STRATEGY

CITY-WIDE
MAP 3

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Figure 7 **Estimated Supply of Approved Single Family/Duplex Lots in Suburban Areas by Sector (2001 and 2002)**

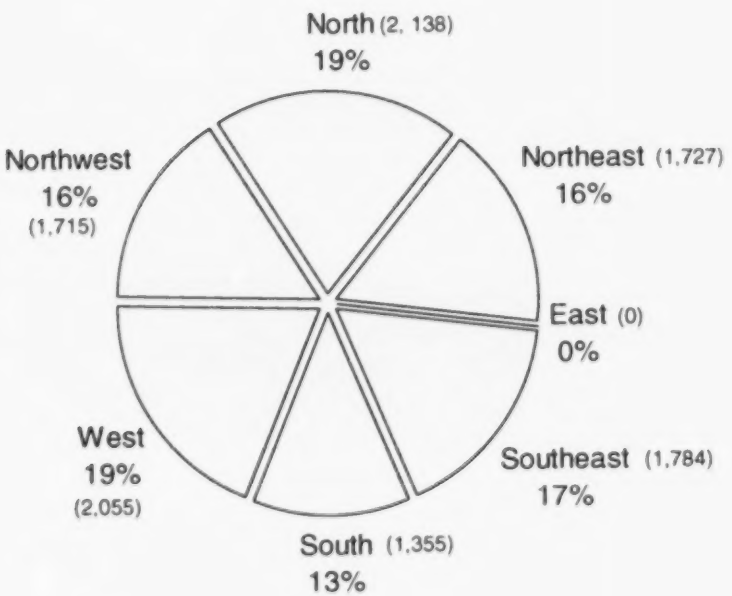
Single Family/Duplex Lots

Sector	2001 (April) Lots Under Construction	2001 (April) Vacant Lots	2001 (April) % of Total Vacant Lots	2002 (April) Lots Under Construction	2002 (April) Vacant Lots	2002 (April) % of Total Vacant Lots
North	192	1,523	12%	336	2,138	19%
Northeast	207	1,734	14%	684	1,727	16%
East	0	0	0%	0	0	0%
Southeast	193	1,110	9%	264	1,784	17%
South	251	1,935	15%	407	1,355	13%
West	303	3,022	24%	532	2,054	19%
Northwest	536	3,330	26%	1,065	1,715	16%
Total	1,682	12,654	100%	3,288	10,773	100%

Estimates include registered lots and lots in approved Tentative Plans.
Percentage numbers may not add due to rounding

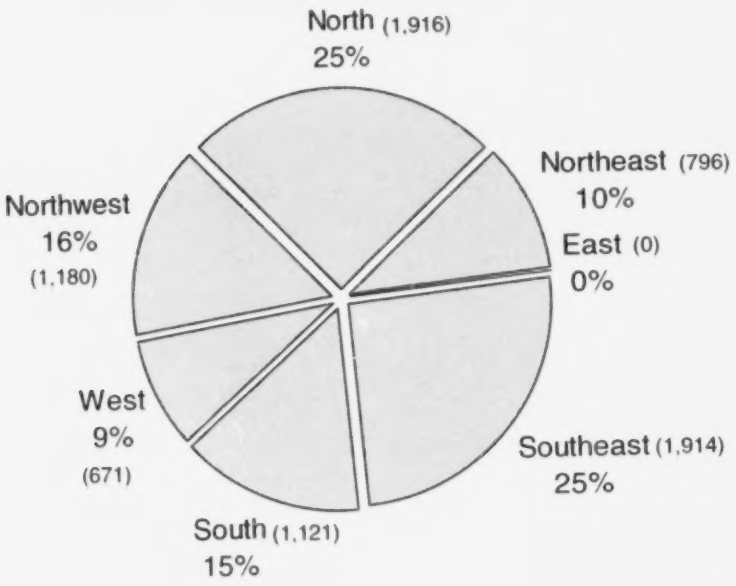
Source: Planning & Transportation Policy 2003

Figure 8 **Distribution of Vacant Single Family/Duplex Lots Compiled by Sector (April 2002)**



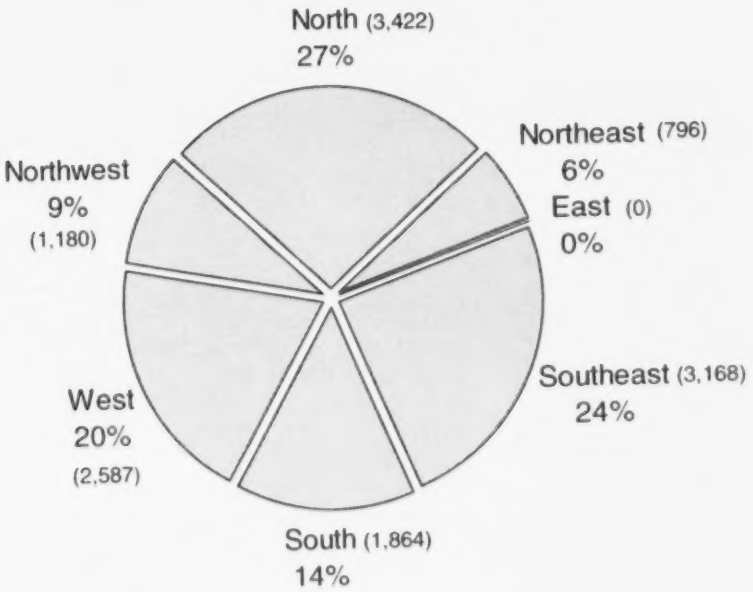
Source: Planning & Transportation Policy 2003

Figure 9 **Distribution of Unsubdivided Residential Land Supply Considered "Fully Serviced" by Sector in Acres (April 2002)**



Source: Planning & Transportation Policy 2003

Figure 10 **Distribution of Unsubdivided Residential Land Supply by Sector in Acres (April 2002)**



Source: Planning & Transportation Policy 2003

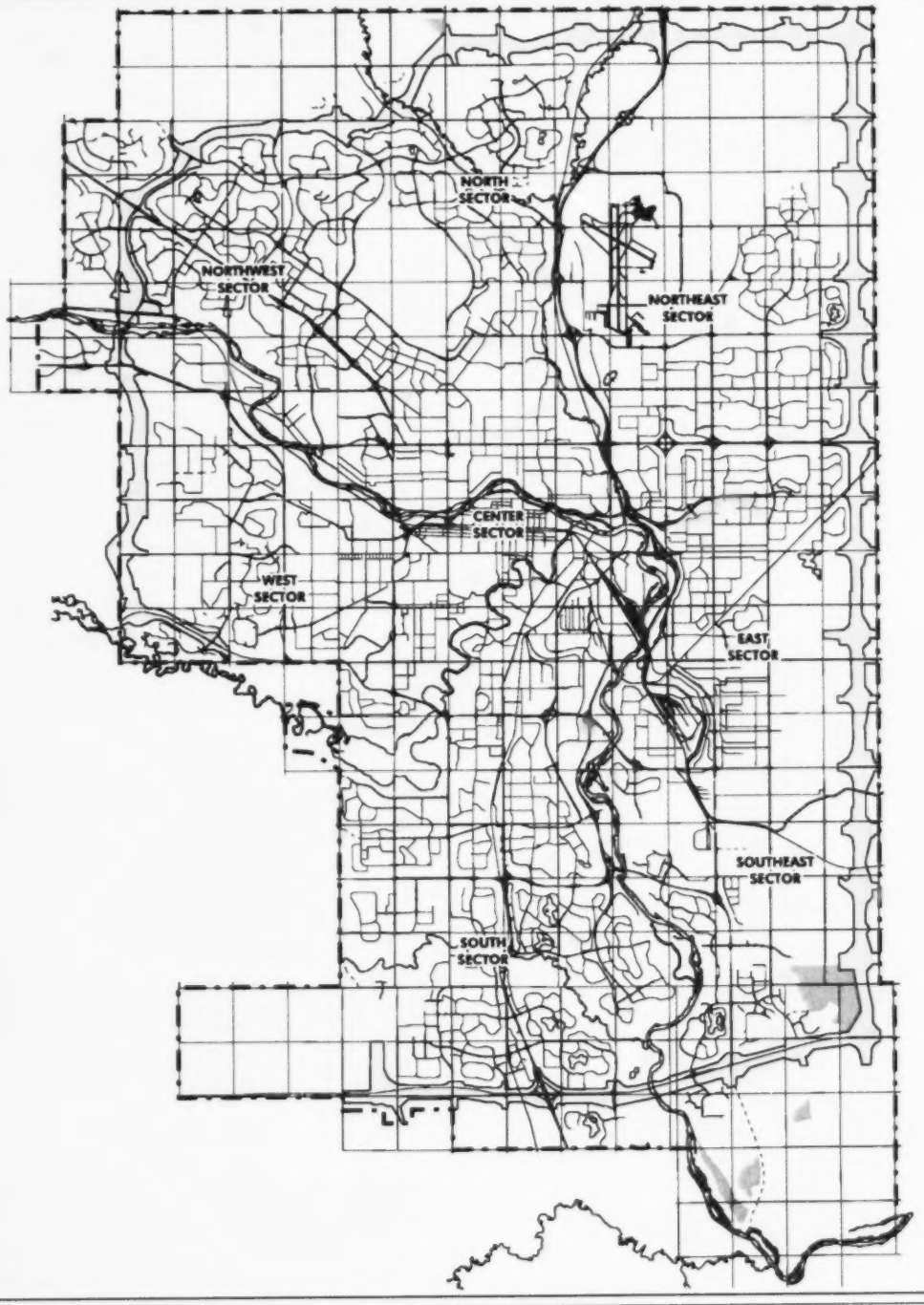
Figure 11 **Estimated Supply of the Unsubdivided Residential Land Supply by Sector in Gross Residential Acres (April 2002)**

Sector	Fully Serviced	Partially Serviced	Unserviced	Total Supply
North	1,916	1,447	59	3,422
Northeast	796	0	0	796
East	0	0	0	0
Southeast	1,914	230	1,024	3,168
South	1,121	0	743	1,864
West	671	1,916	0	2,587
Northwest	1,180	0	0	1,180
Total	7,598 Acres	3,593 Acres	1,826 Acres	13,017 Acres

Notes:
"Fully Serviced": represents lands that have utility capacity in place (both water and sewer in place)
"Partially Serviced": represents lands that have some utility capacity in place (water or sewer but not both)
"Unserviced": represents lands that have no utility capacity in place (no water or sewer in place)

This inventory includes sites identified for multi-family uses in existing Outline Plans (304 acres). The inventory excludes areas of land for which land use policy and/or servicing information is not yet available.

Source: Planning & Transportation Policy 2003



UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 2002)

FULLY SERVICED
(BOTH WATER AND SEWER IN PLACE)

PARTIALLY SERVICED
(WATER OR SEWER, BUT NOT BOTH)

UNSERVICED
(NO WATER OR SEWER IN PLACE)

SECTOR BOUNDARY

AREA SUBJECT TO REVIEW
(WILL INCLUDE BOTH RESIDENTIAL AND NON RESIDENTIAL USES)

TRANSPORTATION UTILITY CORRIDOR

THE CITY OF CALGARY
PLANNING & TRANSPORTATION POLICY

SHORT-TERM GROWTH MANAGEMENT STRATEGY

CITY-WIDE
MAP 4

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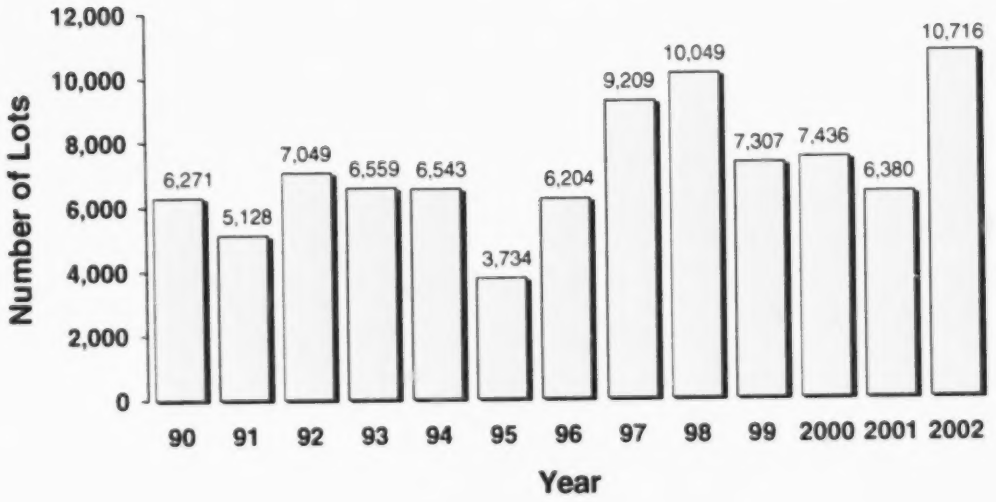
HOUSING AND LAND

Figure 12 Residential Subdivision Activity, Tentative Plan Approvals Number of Lots (1998-2002)

Tentative Plan Approvals Number of Lots	1998	1999	2000	2001	2002	Total
Single Family	7,745	6,088	4,784	4,875	8,305	31,797
Two Family	222	214	508	451	445	1,840
Other Multi Family	75	114	199	41	229	658
Bareland Condominium	541	668	643	331	232	2,415
Total	**8,583**	**7,084**	**6,134**	**5,698**	**9,211**	**36,710**

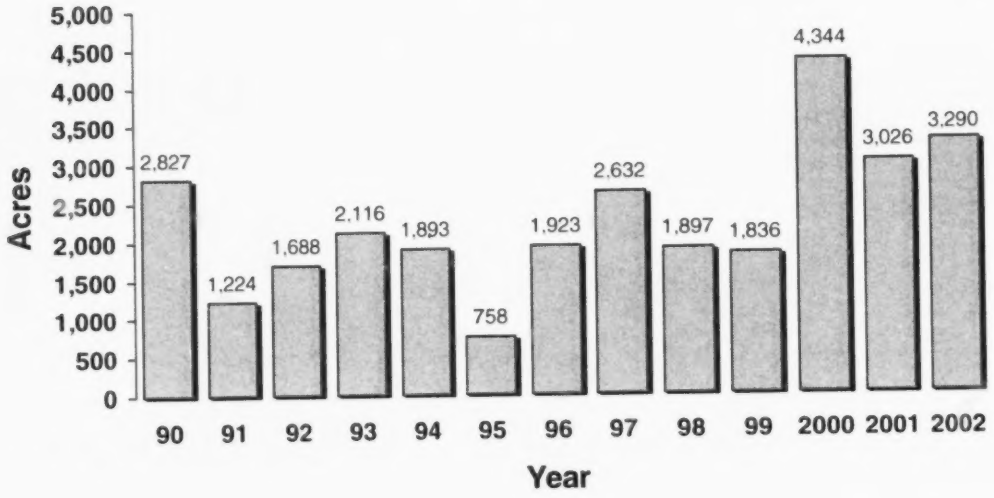
Source: Planning & Transportation Policy, 2003

Figure 13 Tentative Plan Applications, Number of Lots (1990-2002)



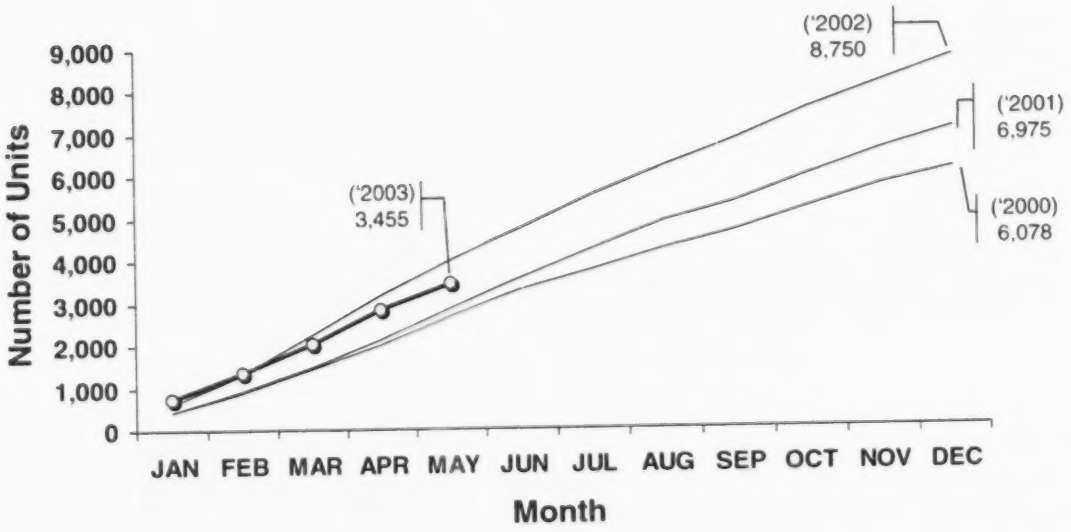
Source: Planning & Transportation Policy 2003

Figure 14 Outline Plan Applications, Number of Acres (1990-2002)



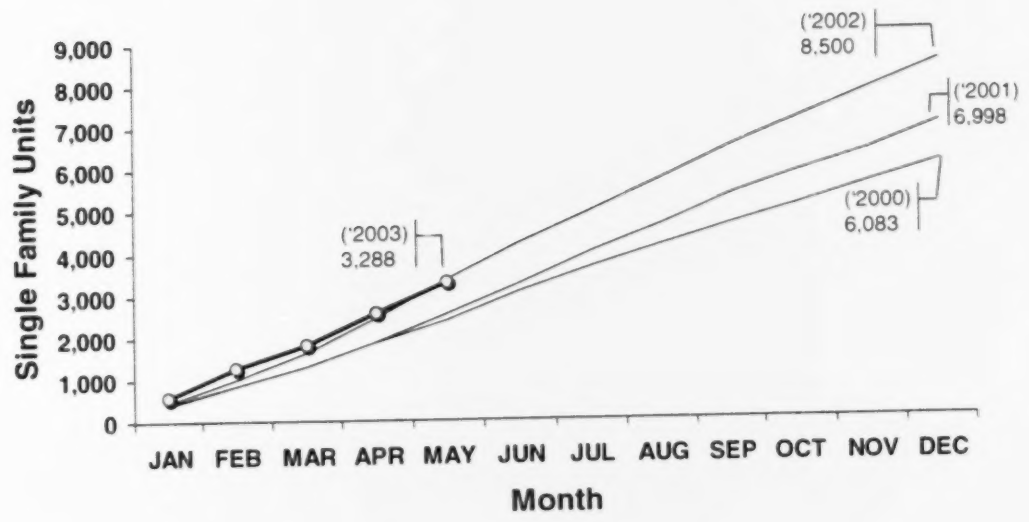
Source: Planning & Transportation Policy 2003

Figure 15 Cumulative Single Family/Duplex Units by Building Permit Applications (2000, 2001, 2002 & 2003 year to date)



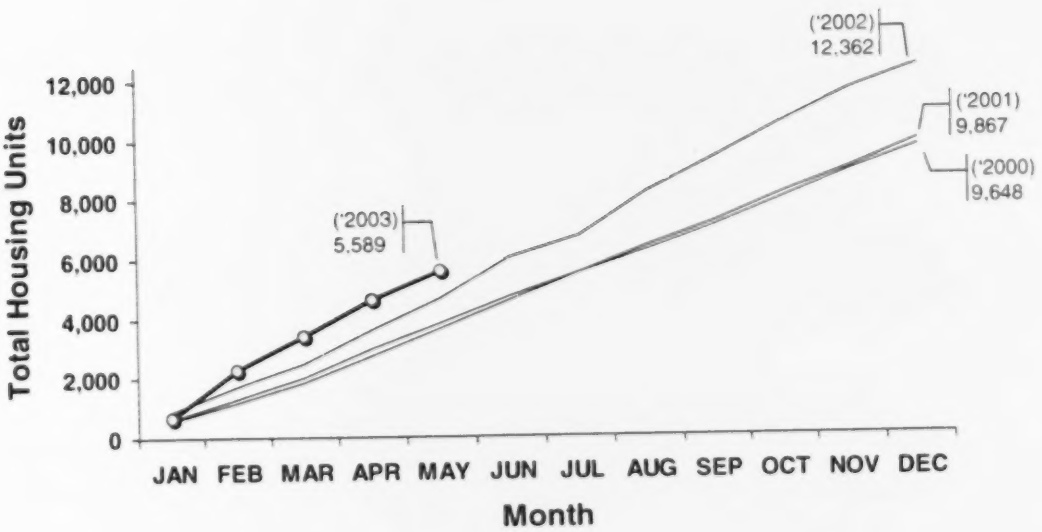
Source: Planning & Transportation Policy 2003

Figure 16 **Cumulative Single Family/Duplex Housing Starts by Month (2000, 2001, 2002 & 2003 year to date)**



Source: Canada Mortgage and Housing Corporation

Figure 17 **Cumulative Total Housing Starts by Month (2000, 2001, 2002 & 2003 year to date)**



Source: Canada Mortgage and Housing Corporation

Figure 18 City-Wide Population and Housing Growth Forecasts for Single-Family/ Duplex and Multi-Family Units (2003-2007)

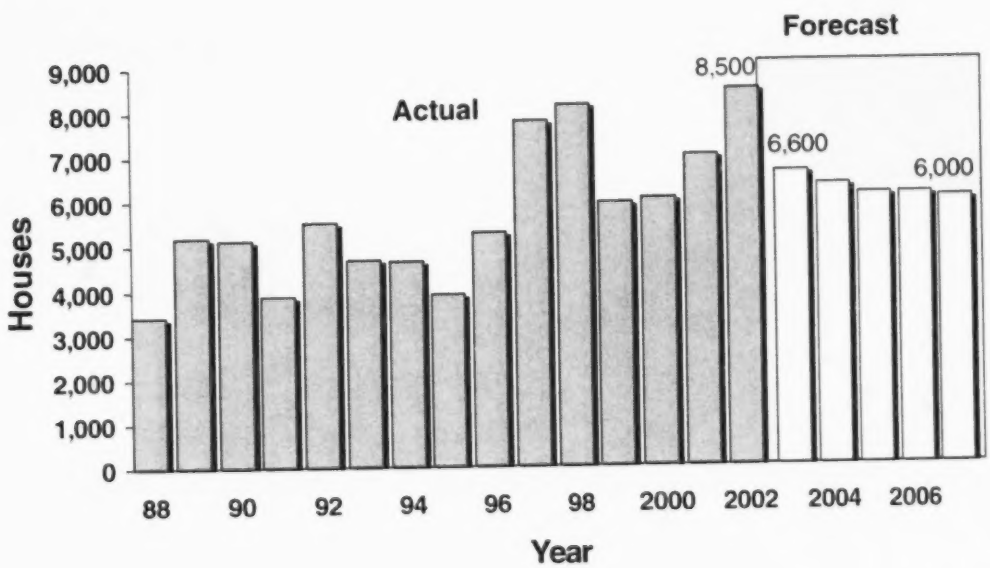
Year	Population	Single Family/Duplex Units	Multi Family Units	Gross Acres of Residential Land Required @ 7 U.P.A.*	**@ 6.5 U.P.A.***	@ 5 U.P.A.*
2002 Actual	904,987	7,627	3,354	1,090	1,170	1,530
2003	924,000	6,600	3,900	1,500	1,620	2,100
2004	942,000	6,300	3,200	1,360	1,460	1,900
2005	959,000	6,100	3,000	1,300	1,400	1,820
2006	974,000	6,100	2,900	1,290	1,380	1,800
2007	989,000	6,000	2,900	1,270	1,370	1,780
2003-2007	84,000 People added	31,100 Units added	15,900 Units added	6,720 Acres	**7,230 Acres**	9,400 Acres

* Units Per Acre Gross Residential Density

Multi Family includes Apartment and Townhouse Units

Source: Civic Census 2002; Corporate Strategy & Economics; Planning & Transportation Policy 2003

Figure 19 Single-Family/Duplex Housing Starts, Actual (1989-2002) and Forecast (2003-2007)



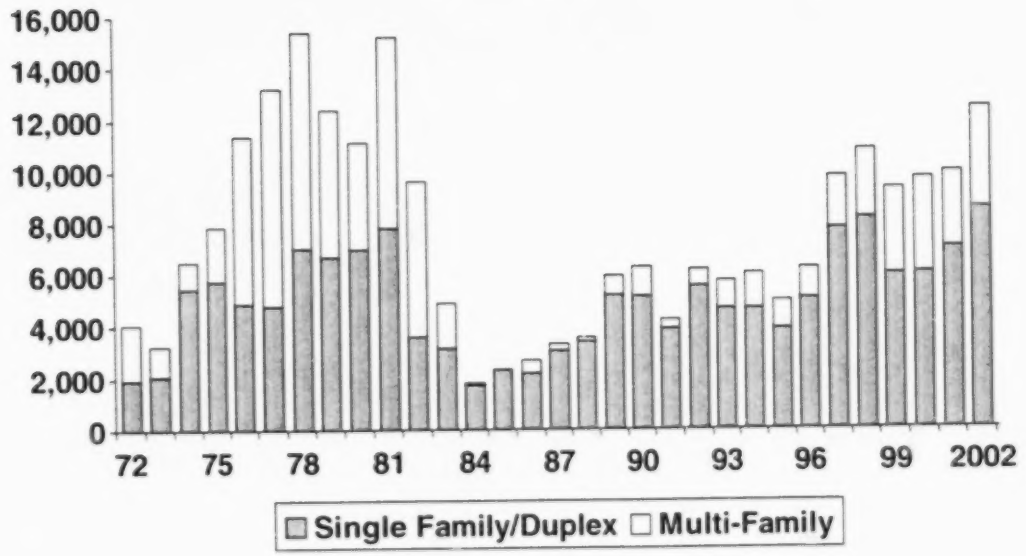
Source: Canada Mortgage and Housing Corporation; Corporate Strategy & Economics

Figure 20 Calgary Housing Starts (1998-2002)

Year	Single Family	Duplex/ Semi	Row	Apts.	Total	Total S.F./ Duplex	Total Multi-Family	% Multi-Family
1998	7,739	418	714	1,874	10,745	8,157	2,588	24%
1999	5,524	430	508	2,791	9,253	5,954	3,299	36%
2000	5,628	408	644	2,968	9,648	6,036	3,612	37%
2001	6,474	524	870	1,999	9,867	6,998	2,869	29%
2002	7,952	548	945	2,917	12,362	8,500	3,862	31%
Five Year Average	6,663 Units	466 Units	736 Units	2,510 Units	10,375 Units	**7,129 Units**	**3,246 Units**	31%

Source: Canada Mortgage and Housing Corporation

Figure 21 Calgary Housing Starts, Single-Family/Duplex and Multi-Family (1972-2002)



Source: Canada Mortgage and Housing Corporation

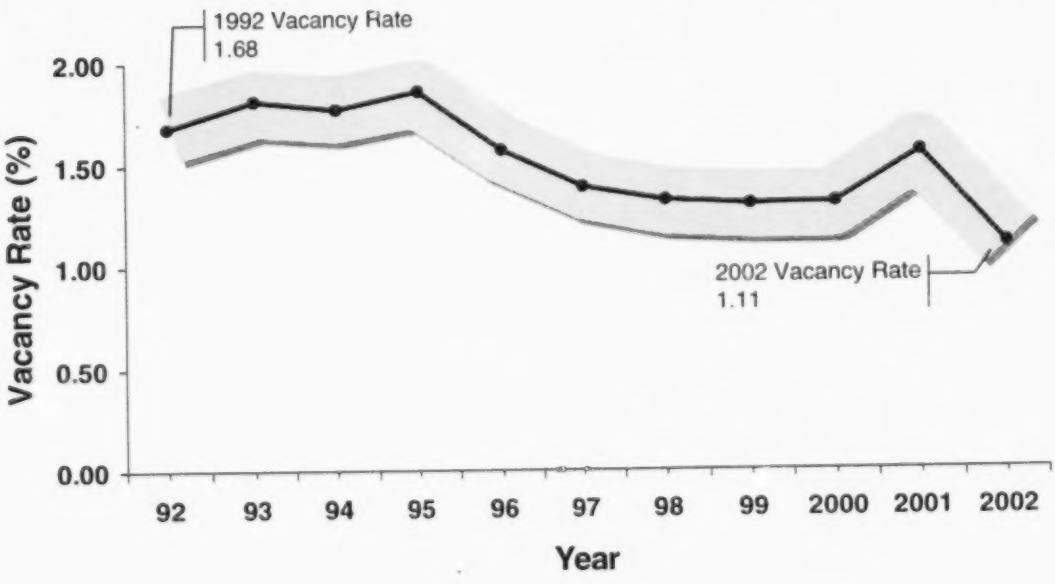
Figure 22 Single-Family/Duplex Housing, Household Growth and Vacancy Rates (1991-2002)

Year	Population Growth	Growth In Occupied Units	Vacant Units	S. F./Duplex Vacancy Rate
91 - 92	8,540	3,223	2,793	1.68%
92 - 93	10,586	4,603	3,104	1.81%
93 - 94	10,465	4,243	3,104	1.77%
94 - 95	10,889	4,315	3,360	1.86%
95 - 96	17,986	4,358	2,900	1.57%
96 - 97	23,439	5,030	2,621	1.39%
97 - 98	28,629	6,799	2,583	1.32%
98 - 99	23,054	*NA	2,734	1.30%
99 - 2000	18,361	5,746	2,858	1.31%
2000 - 2001	15,770	4,755	3,441	1.56%
2001 - 2002	28,468	7,285	2,549	1.11%

*Note: Census method changed in 1999 and Occupied Units have been modified from previous method of collection and was not used for that year.

Source: Civic Census 2002; Corporate Strategy & Economics; Planning & Transportation Policy 2003

Figure 23 Single Family/Duplex Vacancy Rates (1992-2002, April)



Source: Civic Census 2002

Figure 24 Market Share Distribution of New Suburban Single-Family/Duplex Housing and Multi-Family Housing by Sector (1998-2002)

Sector	Single Family/Duplex 1998	1999	2000	2001	2002	Average Share 1998 - 2002
North	22%	17%	14%	13%	16%	17%
Northeast	10%	13%	16%	16%	13%	14%
East	4%	1%	0%	0%	0%	1%
Southeast	15%	11%	9%	10%	13%	11%
South	17%	18%	18%	16%	15%	17%
West	7%	10%	15%	17%	20%	14%
Northwest	27%	29%	28%	27%	23%	27%
Suburban Total	100%	100%	100%	100%	100%	100%

Sector	Multi Family 1998	1999	2000	2001	2002	Average Share 1998 - 2002
North	19%	16%	8%	3%	13%	12%
Northeast	5%	7%	6%	11%	13%	8%
East	1%	13%	6%	0%	16%	7%
Southeast	10%	3%	15%	3%	9%	8%
South	24%	28%	26%	25%	12%	23%
West	12%	13%	18%	25%	13%	16%
Northwest	29%	19%	21%	33%	24%	25%
Suburban Total	100%	100%	100%	100%	100%	100%

* Multi-family includes, apartments and row housing note these are city wide totals

Source: Policy & Transportation Planning, Building Permits New Units

Multi Family Building Permit Application Comparisons, By New Units Added

Multi Family Comparisons - By Suburban Sectors New Units Added	1998	1999	2000	2001	2002	Average Share 1998 - 2002
Suburban Sectors	2,557	2,163	2,857	2,009	4,186	64%
Central Sector	1,251	1,370	1,912	1,338	1,893	36%
City Total	3,808	3,533	4,769	3,347	6,079	100%

* Multi-family includes duplexes, apartments and row housing

Multi Family Comparisons - By Developing Communities New Units Added	1998	1999	2000	2001	2002	Average Share 1998-2002
Developing Communities	1,886	1,301	1,963	1,423	2,608	43%
Remainder of City	1,922	2,232	2,806	1,924	3,471	57%
City Total	3,808	3,533	4,769	3,347	6,079	100%

* Multi-family includes duplexes, apartments and row housing

Multi Family Comparisons - By Developing Communities New Units Added	1998	1999	2000	2001	2002	Average Share 1998 - 2002
Developing Communities	1,667	1,149	1,747	1,162	2,227	41%
Remainder of City	1,815	2,085	2,634	1,755	3,277	59%
City Total	3,482	3,234	4,381	2,917	5,504	100%

* Multi-family includes apartments and row housing
Numbers may not add due to rounding

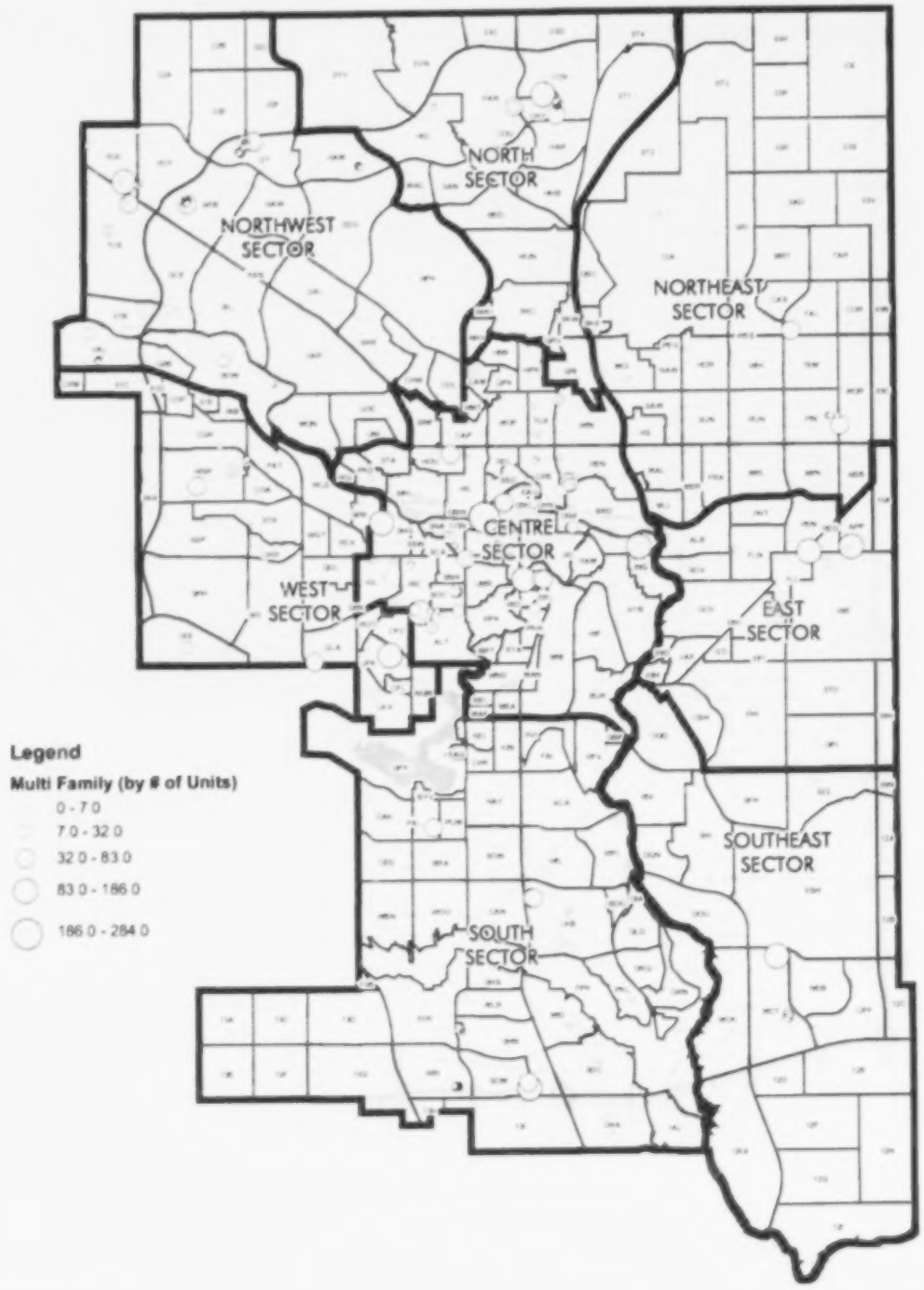
Source: Planning & Transportation Policy 2003; Building Permit Applications New Units Added

BUILDING PERMIT APPLICATIONS
FOR NEW SINGLE FAMILY HOUSES - 2002

THE CITY OF CALGARY
PLANNING & TRANSPORTATION POLICY

SHORT-TERM GROWTH MANAGEMENT STRATEGY

CITY WIDE
MAP 5



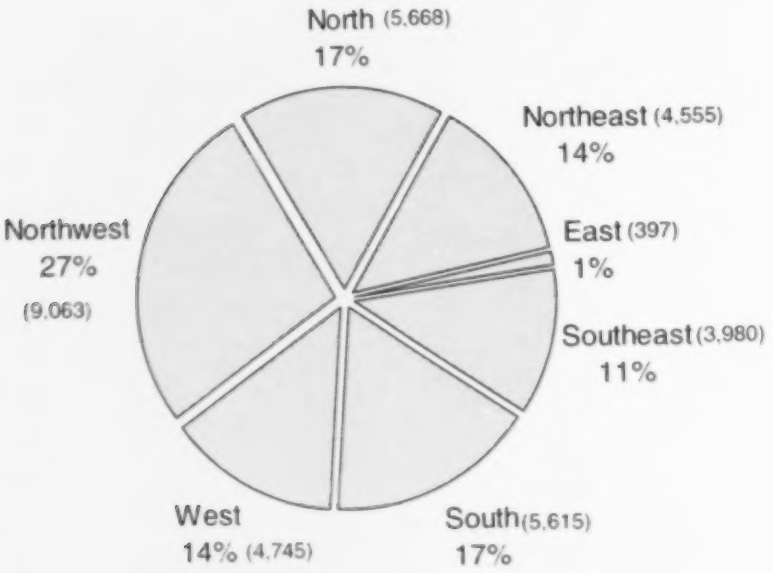
BUILDING PERMIT APPLICATIONS
FOR NEW MULTI FAMILY UNITS – 2002 (Townhouses and Apartment)

THE CITY OF CALGARY
PLANNING & TRANSPORTATION POLICY

SHORT-TERM GROWTH MANAGEMENT STRATEGY

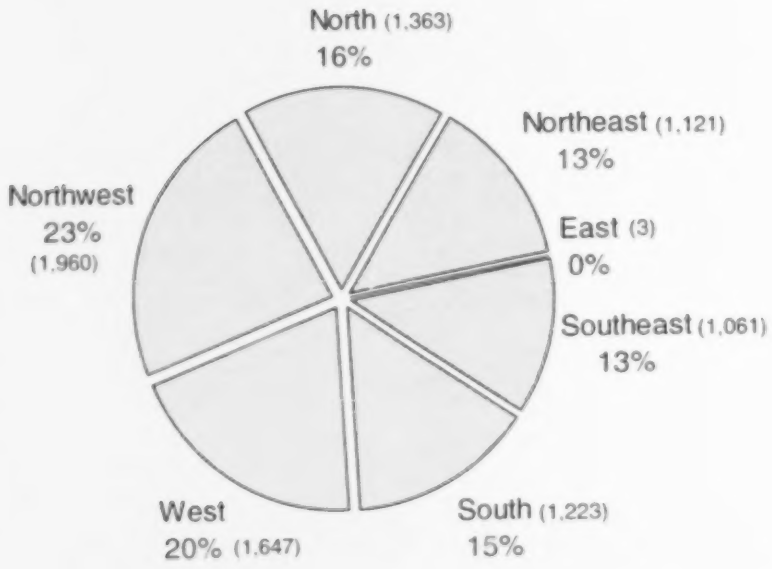
CITY-WIDE
MAP 6

Figure 25 Market Share of New Single-Family/Duplex Units by Sector (1998-2002)



Source: Planning & Transportation Policy 2003

Figure 26 Market Share of New Single-Family/Duplex Units by Sector (2002)



Source: Planning & Transportation Policy 2003

Figure 27 Units Associated with Residential Building Permit Applications - All Communities Within Each Sector (2002)

Suburban Sectors *All Communities*	Single Family/Duplex Units: Single Family	Duplex	Total	% of Suburbs	Multi-Family Units: Row	Apart.	Total	% of Suburbs	All Units: Total	% of City
North	1,239	124	1,363	**16.3%**	71	412	483	**13.1%**	1,846	**13%**
%	67%	7%	74%		4%	22%	26%		100%	
Northeast	1,097	24	1,121	**13.4%**	121	372	493	**13.4%**	1,614	**11%**
%	68%	1%	69%		7%	23%	31%		100%	
East	1	2	3	**0.0%**	48	531	579	**15.7%**	582	**4%**
%	0%	0%	1%		8%	91%	99%		100%	
Southeast	1,033	28	1,061	**12.7%**	114	214	328	**8.9%**	1,389	**10%**
%	74%	2%	76%		8%	15%	24%		100%	
South	1,139	84	1,223	**14.6%**	63	374	437	**11.9%**	1,660	**12%**
%	69%	5%	74%		4%	23%	26%		100%	
West	1,511	136	1,647	**19.7%**	124	356	480	**13.0%**	2,127	**15%**
%	71%	6%	77%		6%	17%	23%		100%	
Northwest	1,915	45	1,960	**23.4%**	371	511	882	**24.0%**	2,842	**20%**
%	67%	2%	69%		13%	18%	31%		100%	
	How much went to the Suburban Sectors									
Suburban Total	7,935	443	8,378	**96%**	912	2,770	3,682	**67%**	12,060	**85%**
%	66%	4%	69%		8%	23%	31%		100%	
	How much went to the Central Sector									
Central Sector	240	132	372	**4%**	242	1,580	1,822	**33%**	2,194	**15%**
%	11%	6%	17%		11%	72%	83%		100%	
City Total	8,175	575	8,750	**100%**	1,154	4,350	5,504	**100%**	14,254	**100%**
%	57%	4%	61%		8%	31%	39%		100%	

Notes: This Table reflects the number of UNITS applied for and NOT the number of applications. (each multi-family project may have a number of units but only one application).
The Table includes applications for NEW BUILDINGS only, and does not include applications to create units through additions or renovations to existing buildings.
Numbers may not add due to rounding.

Source: Planning & Transportation Policy 2003

Figure 28 Units Associated with Residential Building Permit Applications, Developing Communities Only, by Sector (2002)

Suburban Sectors *Developing Communities Only*	Single Family/Duplex Units				Multi-Family Units				All Units	
	Single Family	Duplex	Total	% of Developing Communities	Row	Apart.	Total	% of Developing Communities	Total	% of City
North	1,175	124	1,299	**16.1%**	71	412	483	**21.7%**	1,782	**13%**
%	66%	7%	73%		4%	23%	27%		100%	
Northeast	1,075	24	1,099	**13.6%**	97	0	97	**4.4%**	1,196	**8%**
%	90%	2%	92%		8%	0%	8%		100%	
East	0	0	0	**0.0%**	0	0	0	**0.0%**	0	**0%**
%	0%	0%	0%		0%	0%	0%		0%	
Southeast	1,014	26	1,040	**12.9%**	114	214	328	**14.7%**	1,368	**10%**
%	74%	2%	76%		8%	16%	24%		100%	
South	1,052	46	1,098	**13.6%**	63	241	304	**13.7%**	1,402	**10%**
%	75%	3%	78%		4%	17%	22%		100%	
West	1,493	128	1,621	**20.1%**	124	15	139	**6.2%**	1,760	**12%**
%	85%	7%	92%		7%	1%	8%		100%	
Northwest	1,872	33	1,905	**23.6%**	398	478	876	**39.3%**	2,781	**20%**
%	67%	1%	69%		14%	17%	31%		100%	
Developing Communites Total	How much went to the Developing Communities?									
	7,681	381	8,062	**92%**	867	1,360	2,227	**40%**	10,289	**72%**
%	75%	4%	78%		8%	13%	22%		100%	
Remainder of City	How much went to the Remainder of the City									
	494	194	688	**8%**	287	2,990	3,277	**60%**	3,965	**28%**
%	12%	5%	17%		7%	75%	83%		100%	
City Total	8,175	575	8,750	**100%**	1,154	4,350	5,504	**100%**	14,254	**100%**
%	57%	4%	61%		8%	31%	39%		100%	

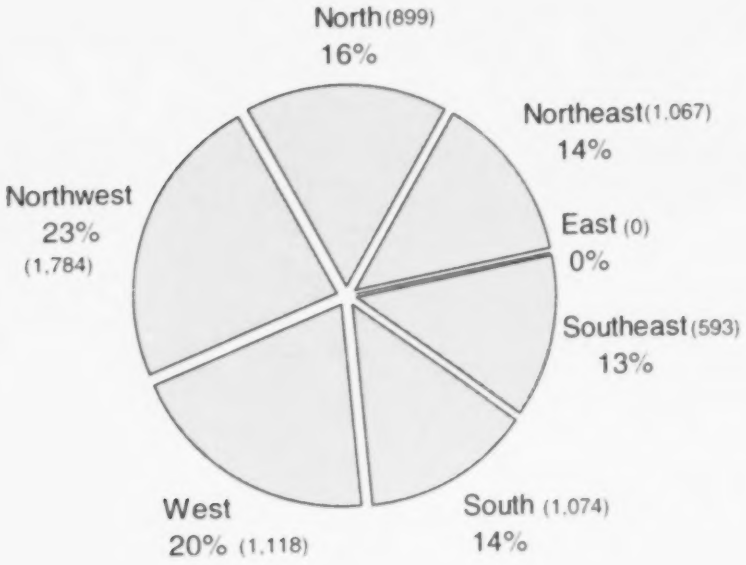
Notes: This Table reflects the number of UNITS applied for and NOT the number of applications, (each multi-family project may have a number of units but only one application).

The Table includes applications for NEW BUILDINGS only, and does not include applications to create units through additions or renovations to existing buildings.

Numbers may not add due to rounding.

Source: Planning & Transportation Policy 2003

Figure 29 Market Share of New Single-Family/Duplex Units, Developing Communities (2002)



Source: Planning & Transportation Policy 2003

Figure 30 Units Associated with Residential Building Permit Applications, in the Developing Communities by Community and Sector (Units Added 2002)

January 1 to December 31, 2002 Suburban Sectors *Developing Communities Only*	Single Family/Duplex Units					Multi-Family Units				All Units	
	Single Family	Duplex	Total	% of all Dev. Com.	Top Ten	Row	Apart.	Total	% of all Dev. Com.	Total	% of Sector
North											
Country Hills Village	0	2	2			67	328	395		397	22%
Coventry Hill	462	0	462		6	0	0	0		462	26%
Evanston	25	2	27			0	0	0		27	2%
Hidden Valley	156	86	242			4	0	4		246	14%
Panorama Hills	502	34	536		3	0	84	84		620	35%
Symons Valley	30	0	30			0	0	0		30	2%
Developing Communites Total	**1,175**	**124**	**1,299**	**16%**		**71**	**412**	**483**	**22%**	**1,782**	**13%**
% of all Units for the sector	66%	7%	73%			4%	23%	27%		100%	% of City
Northeast											
Martindale	220	0	220			0	0	0		220	18%
Saddleridge	328	0	328		10	0	0	0		328	27%
Taradale	527	24	551		2	97	0	97		648	54%
Developing Communites Total	**1,075**	**24**	**1,099**	**14%**		**97**	**0**	**97**	**4%**	**1,196**	**8%**
% of all Units	90%	2%	92%			8%	0%	8%		100%	% of City
Southeast											
Copperfield	178	0	178			0	0	0		178	13%
Cranston	331	0	331		9	0	0	0		331	24%
Mckenzie Towne	386	26	412		7	114	214	328		740	54%
New Brighton	117	0	117			0	0	0		117	9%
Developing Communites Total	**1,012**	**26**	**1,038**	**13%**		**114**	**214**	**328**	**15%**	**1,366**	**10%**
% of all Units	74%	2%	76%			8%	16%	24%		100%	% of City
South											
Bridlewood	239	1	240			41	0	41		281	20%
Chaparral	256	24	280			0	0	0		280	20%
Evergreen	229	0	229			0	0	0		229	16%
Shawnessy	139	21	160			22	15	37		197	14%
Somerset	189	0	189			0	226	226		415	30%
Developing Communites Total	**1,052**	**46**	**1,098**	**13.6%**		**63**	**241**	**304**	**13.7%**	**1,402**	**10%**
% of all Units	75%	3%	78%			4%	17%	22%		100%	% of City
West											
Aspen Woods	17	0	17			0	0	0		17	1%
Cougar Ridge	318	40	358		8	4	0	4		362	21%
Crestmont	74	0	74			0	0	0		74	4%
Discovery Ridge	189	38	227			10	0	10		237	13%
Signal Hill	135	12	147			0	0	0		147	8%
Springbank Hill	177	10	187			0	0	0		187	11%
Strathcona	118	12	130			0	0	0		130	7%
West Springs	465	16	481		4	110	15	125		606	34%
Developing Communites Total	**1,493**	**128**	**1,621**	**20.1%**		**124**	**15**	**139**	**6.2%**	**1,760**	**12%**
% of all Units	85%	7%	92%			7%	1%	8%		100%	% of City
Northwest											
Arbour Lake	144	0	144			41	103	144		288	10%
Citadel	268	0	268			164	130	294		562	20%
Hamptons	97	0	97			0	16	16		113	4%
Rocky Ridge	162	33	195			65	139	204		399	14%
Royal Oak	473	0	473		5	18	16	34		507	18%
Tuscany	585	0	585		(1)	101	42	143		728	26%
Valley Ridge	143	0	143			9	32	41		184	7%
Developing Communites Total	**1,872**	**33**	**1,905**	**23.6%**		**398**	**478**	**876**	**39.3%**	**2,781**	**20%**
% of all Units	67%	1%	69%			14%	17%	31%		100%	% of City
	How much went to the Developing Communities?										
Developing Communites Total	7,679	381	8,060	**92%**		867	1,360	2,227	**41%**	10,287	**72%**
% of all Units	75%	4%	78%			8%	13%	22%		100%	
	How much went to the Remainder of the City										
Remainder of City	506	196	702	**8%**		259	2,990	3,249	**59%**	3,951	**28%**
% of all Units	13%	5%	18%			7%	76%	82%		100%	

Source: Planning & Transportation Policy 2003

Figure 31 Developing Communities Unit History, New Building Permits, by Sector, (1998 - 2002)

Single Family/Duplex History January 1, to December 31 New Building Permits

Historical Developing Communities Shares (Single Family & Duplex)										
	1998		1999		2000		2001		2002	
Sector	%	Units	%	Units	%	Units	%	Units	%	Units
North	22%	1,618	18%	978	14%	805	14%	899	16%	1,299
Northeast	10%	718	13%	721	15%	835	16%	1,067	14%	1,098
East	4%	271	1%	72	0%	0	0%	0	0%	0
Southeast	13%	948	11%	625	9%	523	9%	593	13%	1,040
South	17%	1,211	18%	1,008	17%	974	16%	1,074	14%	1,098
West	7%	486	10%	567	15%	846	17%	1,118	20%	1,621
Northwest	27%	1,967	29%	1,602	29%	1,610	27%	1,784	24%	1,905
Total	100%	7,219	100%	5,573	100%	5,593	100%	6,535	100%	8,061
Percentage to Developing Communities		94%		94%		92%		93%		92%

City Total (Single Family & Duplex)									
	1998 Units		1999 Units		2000 Units		2001 Units		2002 Units
City Total	7,709		5,954		6,102		7,048		8,761

Multi Family History January 1, to December 31 New Building Permits

Historical Developing Communities Shares (Apartment & Townhouse/Row)										
	1998		1999		2000		2001		2002	
Sector	%	Units	%	Units	%	Units	%	Units	%	Units
North	22%	375	18%	210	12%	203	4%	47	22%	483
Northeast	0%	0	6%	71	1%	11	4%	51	4%	97
East	0%	0	0%	0	0%	0	0%	0	0%	0
Southeast	14%	237	5%	57	21%	374	4%	52	15%	328
South	11%	188	32%	362	26%	453	23%	273	14%	304
West	12%	194	9%	102	10%	171	16%	190	6%	139
Northwest	40%	673	30%	347	31%	535	47%	549	39%	876
Total	100%	1,667	100%	1,149	100%	1,747	100%	1,162	100%	2,227
Percentage to DevelopingCommunities	48%		35%		40%		40%		41%	

City Total (Apartment & Townhouse/Row)									
	1998 Units		1999 Units		2000 Units		2001 Units		2002 Units
City Total	3,468		3,259		4,381		2,917		5,476

Source: Planning & Transportation Policy 2003

DEMAND

Figure 32 Location of Developer Proposals for Residential Subdivision Development (2003)

Sector	Hectares	Acres	%	Community Districts Affected
North	181	448	**19%**	Coventry Hills, Country Hills Village, Evanston, Panorama Hills, Symon's Valley
Northeast	95	234	**10%**	Martindale, Saddle Ridge, Taradale
East	0	0	**0%**	None in 2003
Southeast	98	242	**10%**	Copperfield, Cranston, McKenzie Towne, New Brighton
South	116	287	**12%**	Bridlewood, Chaparral, Evergreen,
West	252	621	**27%**	Aspen Woods, Crestmont, Cougar Ridge, Discovery Ridge, Springbank Hill, West Springs
Northwest	198	490	**21%**	Arbour Lake, Citadel, Edgemont, Rocky Ridge, Royal Oak, Tuscany, Valley Ridge
Total	940	2,322	**100%**	

Source: Land Use and Mobility, 2003 & Planning & Transportation Policy, 2003 Developer Survey - 2003 Development Proposals
See Map 3

Figure 33 Short-Term Estimates of Single-Family/Duplex Housing Demand and Distribution by Sector, Developing Communities and City-Wide (2003-2007)

(3)

Sector	Historical Share 1998-2002 % 5 year	Historical Share 2000-2002 % 3 year	Historical Share 2001-2002 % 2 year	Single Family/Duplex to the Developing Communities Forecast 2003 %	2003 Units	2004 %	2004 Units	2005 %	2005 Units	2006 %	2006 Units	2007 %	2007 Units	2003 - 2007 Average Share (%)	2003 - 2007 Total Units	2003 - 2007 Total Acres
North	17%	15%	15%	18%	1,100	19%	1,110	20%	1,130	21%	1,190	22%	1,220	**20%**	**5,750**	**960**
Northeast	13%	15%	15%	14%	860	14%	820	14%	790	14%	790	14%	780	**14%**	**4,040**	**670**
East	1%	0%	0%	0%	0	0%	0	0%	0	0%	0	0%	0	**0%**	**0**	**0**
Southeast	11%	11%	11%	14%	860	17%	990	18%	1,020	19%	1,070	21%	1,170	**18%**	**5,110**	**850**
South	16%	16%	15%	15%	920	15%	880	15%	850	15%	850	15%	830	**15%**	**4,330**	**720**
West	14%	18%	19%	18%	1,100	16%	930	16%	900	16%	900	15%	830	**16%**	**4,660**	**780**
Northwest	27%	26%	25%	21%	1,280	19%	1,110	17%	960	15%	850	13%	720	**17%**	**4,920**	**820**
Developing Total	100%	100%	100%	100%	**6,118**	100%	**5,840**	100%	**5,655**	100%	**5,655**	100%	**5,562**	100%	**28,810**	**4,800**
					@93%		@93%		@93%		@93%		@93%		@93%	

(2)

	Historical Share 1998-2002 5 year	Historical Share 2000-2002 3 year	Historical Share 2001-2002 2 year	Total Single Family/Duplex Forecast 2003 Units	2004 Units	2005 Units	2006 Units	2007 Units	2003 - 2007 Total Units	2003 - 2007 Total Acres
City Total	65%	63%	66%	**6,600**	**6,300**	**6,100**	**6,100**	**6,000**	**31,100**	**5,183**
			Share of total units=	63%	66%	67%	68%	67%		

(1)

	Total Units Forecast (Single Family/Duplex/Townhouse & Apartment) 2003 Units	2004 Units	2005 Units	2006 Units	2007 Units	2003 - 2007 Total Units
City Total	**10,500**	**9,500**	**9,100**	**9,000**	**8,900**	**47,000**

Notes: Total SF/Duplex acres based on 6.0 units per acres which do not include Multi Family units estimates.

(1) Total City Forecast for all unit types Single Family and Multi Family.

(2) Forecasts assume 400 duplex units per year in addition to single family units.

(3) Historical share of growth in Single Family/Duplex that occurred in the developing communities over the last 5 year period was **93%** and is used to forecast the next 5 years shares.

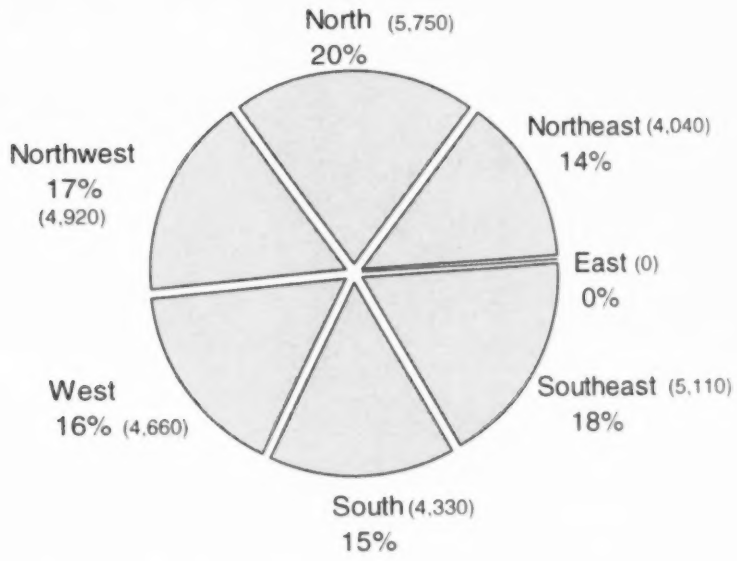
Totals may not add due to rounding.

SOURCE: Planning and Transportation Policy, 2003 / Socio-Economic Outlook 2002-2007 Calgary and Region Report (Updated)

Source: Planning & Transportation Policy 2003

Map 8 "Forecasted Growth" builds in additional land requirements using various densities of the actual planned land supply to accommodate the forecasted population, and housing growth, including Multi Family. The land and unit needs are typically higher than the generalized "Total Acres" and "Total Units" shown here.

Figure 34 Expected Distribution of New Single-Family/Duplex Units by Sector, Developing Communities (2003-2007)



Source: Planning & Transportation Policy 2003

Figure 35 Short-Term Estimates of Residential Land Supply and Demand Conditions for Single-Family/Duplex Uses by Developing Communities (2003-2007)

Sector	2003	2004	2005	2006	2007	Total Demand 2003-2007	Supply With Utility Capacity (*)	Surplus or Shortfall By 2007(*)
North	169	171	174	183	188	960	1,845	885
Northeast	132	137	122	122	120	670	796	126
East	0	0	0	0	0	0	0	NA
Southeast	132	152	157	165	180	850	1,854	1,004
South	142	135	131	131	128	720	1,077	357
West	169	143	138	138	128	780	624	-156
Northwest	197	171	148	131	111	820	1,098	278
Total	940 Acres	910 Acres	870 Acres	870 Acres	850 Acres	4,800 Acres	7,294 Acres	2,494 Acres

Notes: * Unsubdivided land only.

Excludes supply available in existing vacant subdivided lots (refer to Figure 7).

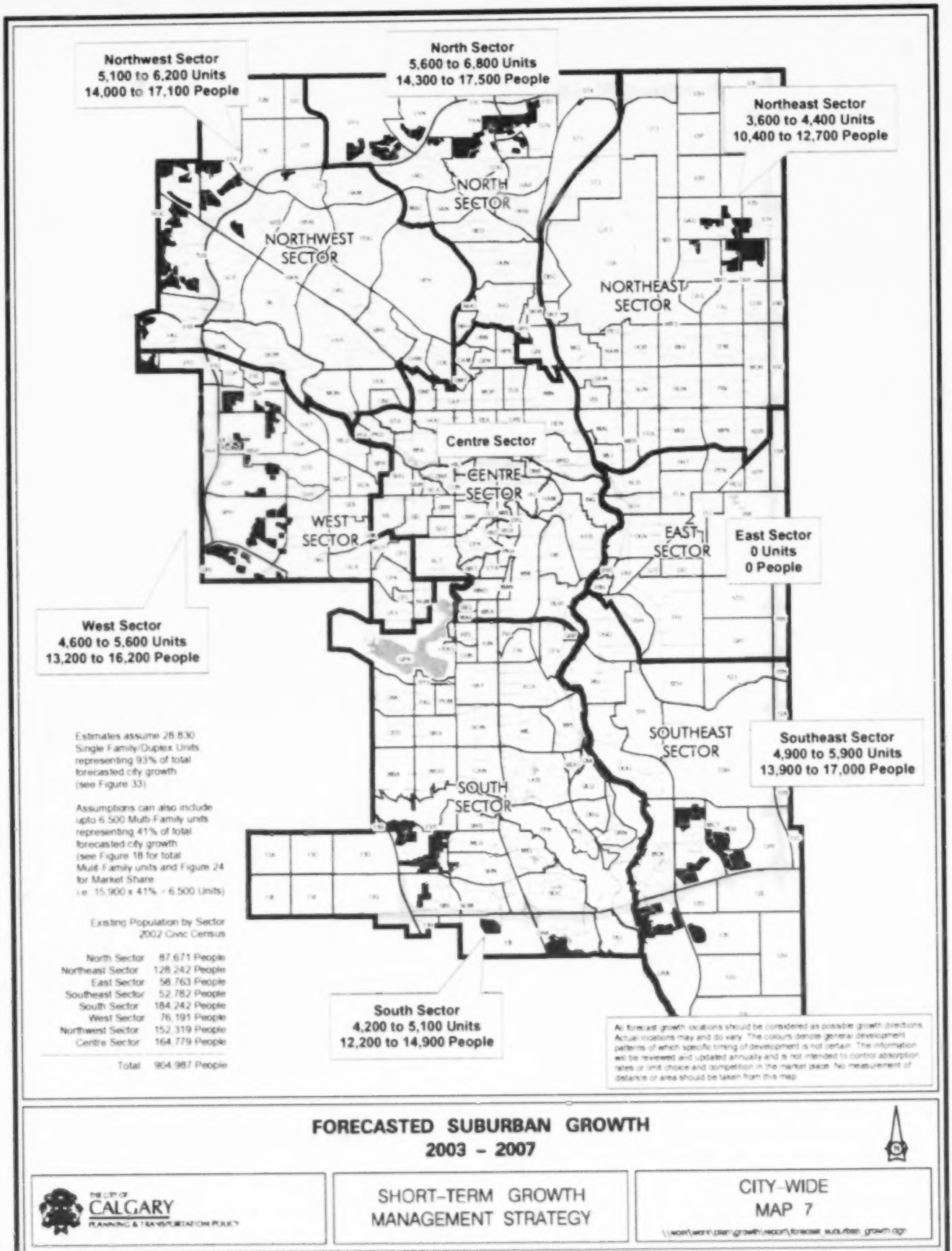
10,773 Vacant Single Family/Duplex Units,

1,796 Acres

Also excludes land designated for multi-family uses (304 acres), which was included in Figure 11.

Numbers may not total due to rounding.

Source: Planning & Transportation Policy 2003


Northwest Sector
5,100 to 6,200 Units
14,000 to 17,100 People
North Sector
5,600 to 6,800 Units
14,300 to 17,500 People
Northeast Sector
3,600 to 4,400 Units
10,400 to 12,700 People
NORTH SECTOR
NORTHWEST SECTOR
NORTHEAST SECTOR
Centre Sector
CENTRE SECTOR
WEST SECTOR
EAST SECTOR
East Sector
0 Units
0 People
West Sector
4,600 to 5,600 Units
13,200 to 16,200 People
SOUTHEAST SECTOR
Southeast Sector
4,900 to 5,900 Units
13,900 to 17,000 People
SOUTH SECTOR
South Sector
4,200 to 5,100 Units
12,200 to 14,900 People
Estimates assume 28,830 Single Family/Duplex Units representing 93% of total forecasted city growth (see Figure 33)
Assumptions can also include upto 6,500 Multi-Family units representing 41% of total forecasted city growth (see Figure 18 for total Multi-Family units and Figure 24 for Market Share i.e. 15,900 x 41% = 6,500 Units)
Existing Population by Sector
2002 Civic Census
North Sector 87,671 People
Northeast Sector 128,242 People
East Sector 58,763 People
Southeast Sector 52,782 People
South Sector 184,242 People
West Sector 76,191 People
Northwest Sector 152,319 People
Centre Sector 164,779 People
Total 904,987 People
All forecast growth locations should be considered as possible growth directions. Actual locations may and do vary. The colours denote general development patterns of which specific timing of development is not certain. The information will be reviewed and updated annually and is not intended to control absorption rates or limit choice and competition in the market place. No measurement of distance or area should be taken from this map.

FORECASTED SUBURBAN GROWTH
2003 – 2007

THE CITY OF CALGARY
PLANNING & TRANSPORTATION POLICY

SHORT-TERM GROWTH MANAGEMENT STRATEGY

CITY-WIDE
MAP 7

\\work\work\plan\growth\report\forecast suburban growth.dgn

APPENDIX II

SECTOR PROFILES

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Figure 1 North Sector, Recent Growth in Housing

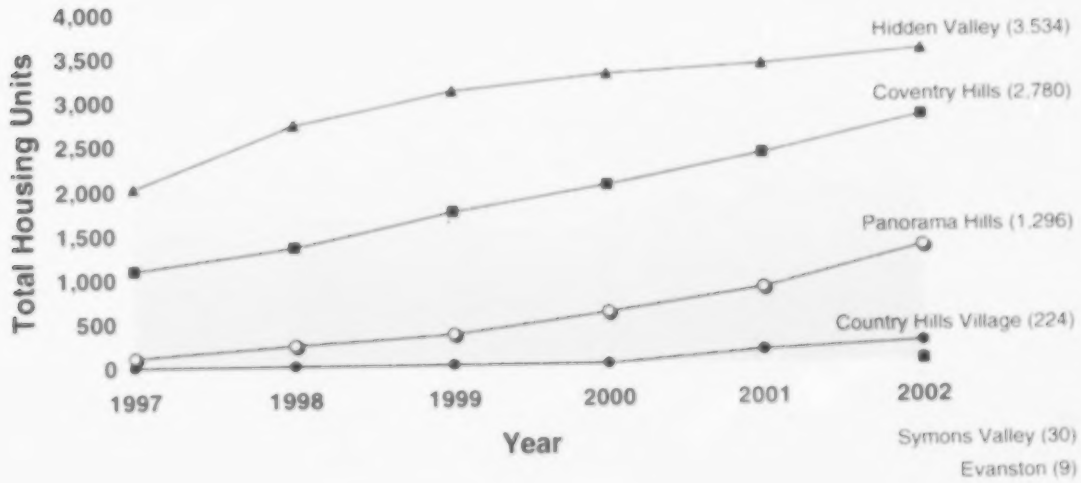
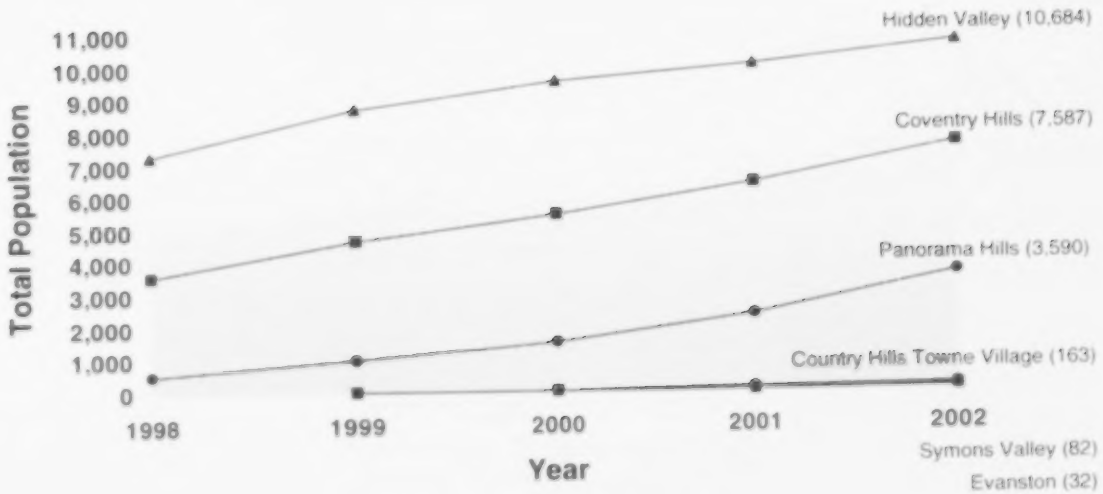


Figure 2 North Sector, Recent Growth in Population



Source: Civic Census 2002

Figure 3 North Sector, Housing Capacity of Developing Communities

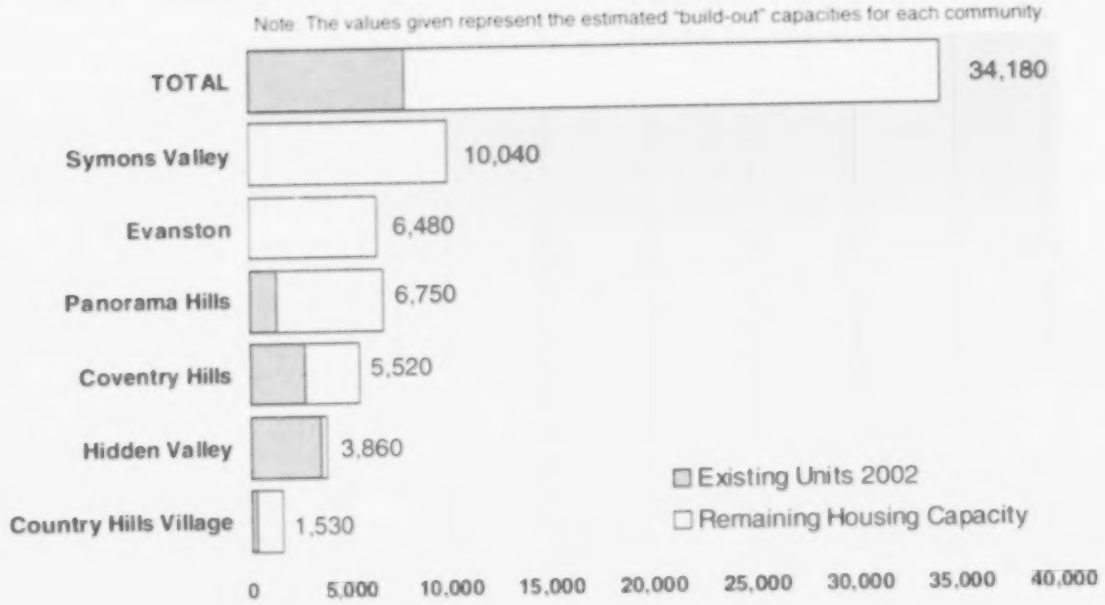
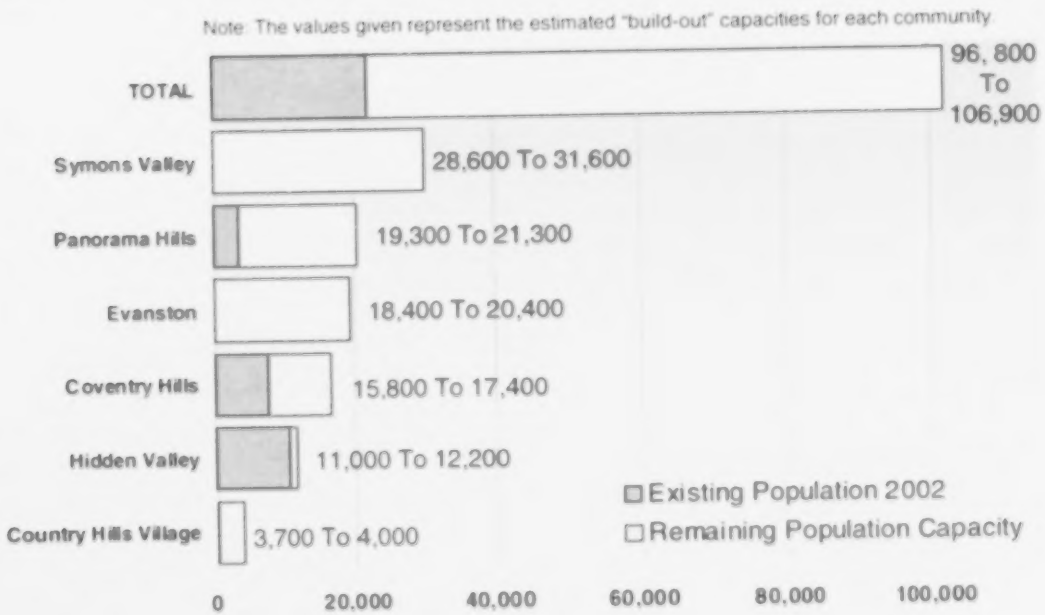
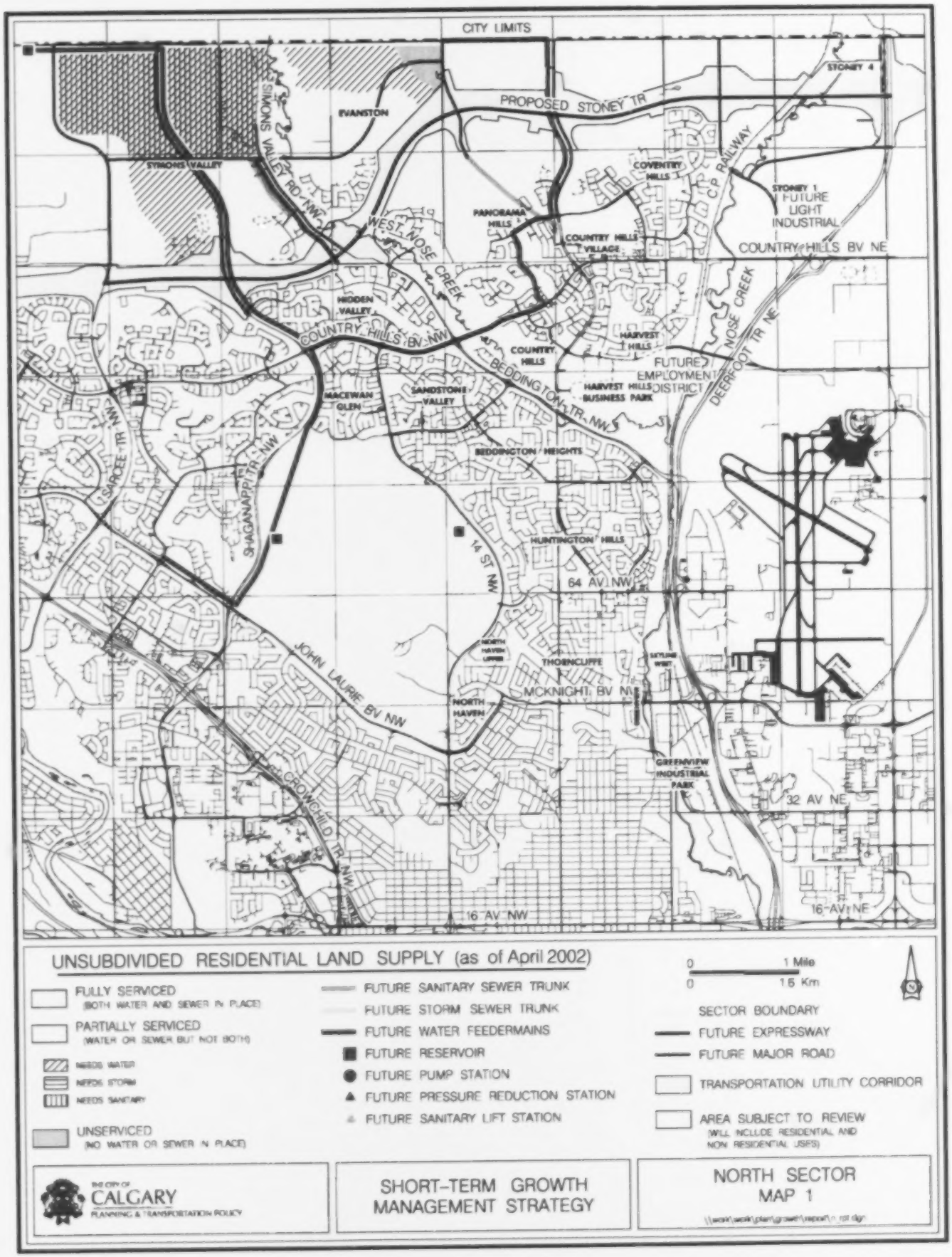


Figure 4 North Sector, Population Capacity of Developing Communities



Estimated housing and population capacities are based on planning approvals currently in place and / or on development densities generally being achieved in new areas. Estimates do not include recently annexed lands without policy plans in place (refer to Sector Maps for locations). For existing housing and population capacity see the previous page.

Source: Planning & Transportation Policy 2003



UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 2002)

- FULLY SERVICED (BOTH WATER AND SEWER IN PLACE)
- PARTIALLY SERVICED (WATER OR SEWER BUT NOT BOTH)
  - NEEDS WATER
  - NEEDS STORM
  - NEEDS SANITARY
- UNSERVICED (NO WATER OR SEWER IN PLACE)

- FUTURE SANITARY SEWER TRUNK
- FUTURE STORM SEWER TRUNK
- FUTURE WATER FEEDERMAINS
- FUTURE RESERVOIR
- FUTURE PUMP STATION
- FUTURE PRESSURE REDUCTION STATION
- FUTURE SANITARY LIFT STATION

0 1 Mile
0 1.5 Km

- SECTOR BOUNDARY
- FUTURE EXPRESSWAY
- FUTURE MAJOR ROAD
- TRANSPORTATION UTILITY CORRIDOR
- AREA SUBJECT TO REVIEW (WILL INCLUDE RESIDENTIAL AND NON RESIDENTIAL USES)

THE CITY OF CALGARY
PLANNING & TRANSPORTATION POLICY

SHORT-TERM GROWTH MANAGEMENT STRATEGY

NORTH SECTOR
MAP 1

Figure 5 Northeast Sector, Recent Growth in Housing

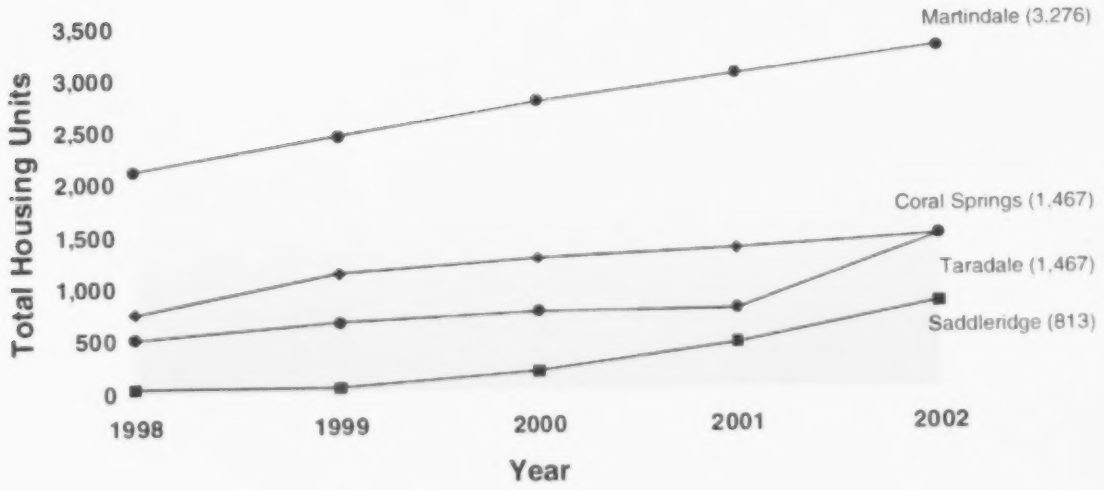
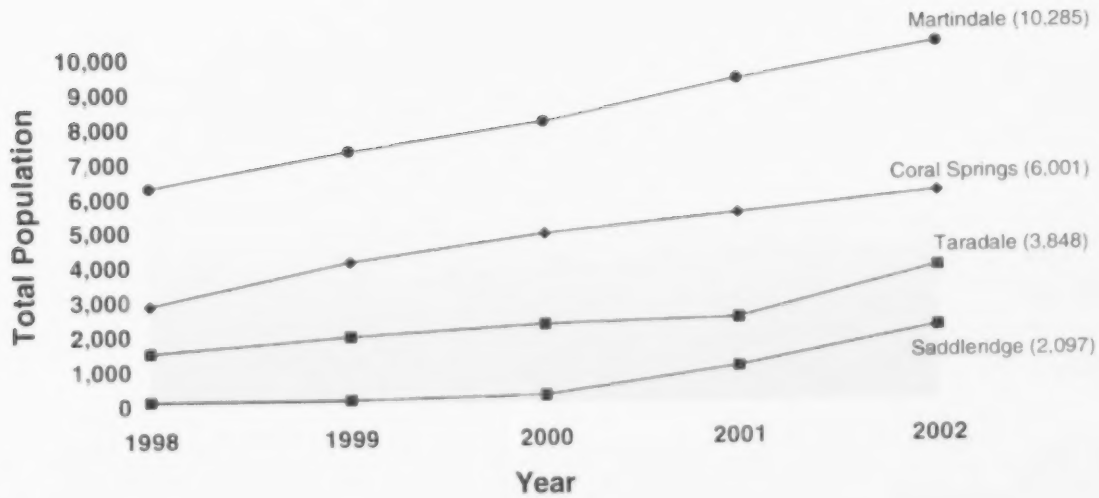


Figure 6 Northeast Sector, Recent Growth in Population



Source: Civic Census 2002

Figure 7 Northeast Sector, Housing Capacity of Developing Communities

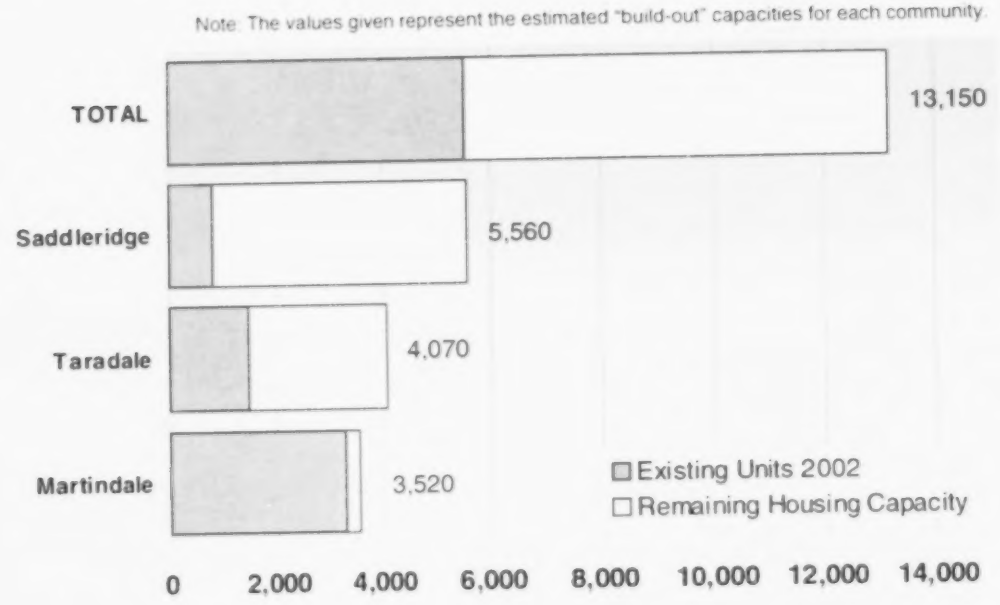
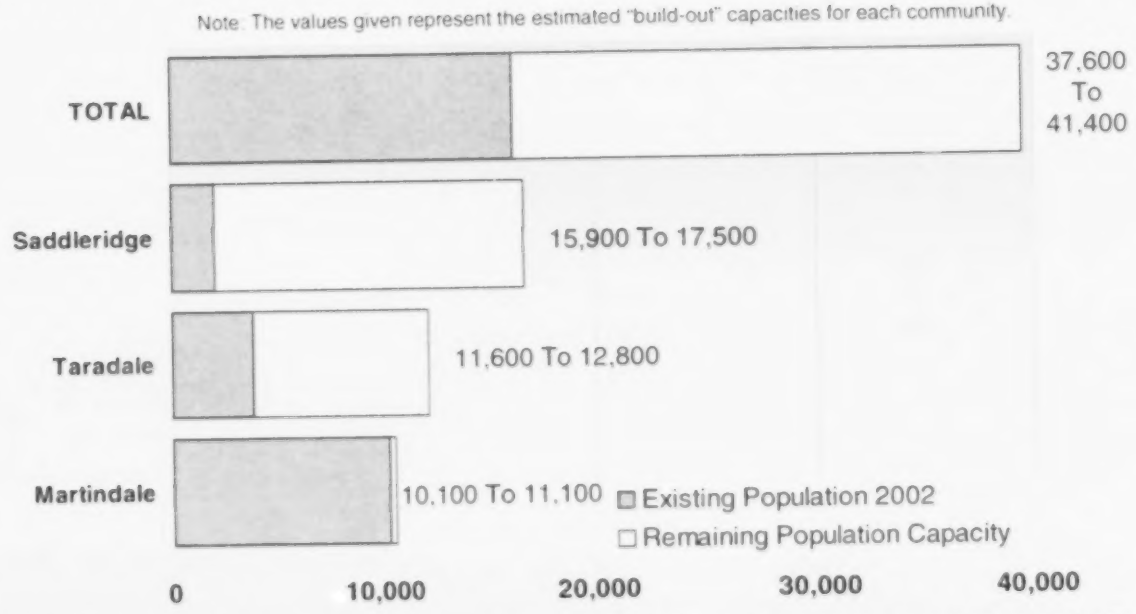


Figure 8 Northeast Sector, Population Capacity of Developing Communities



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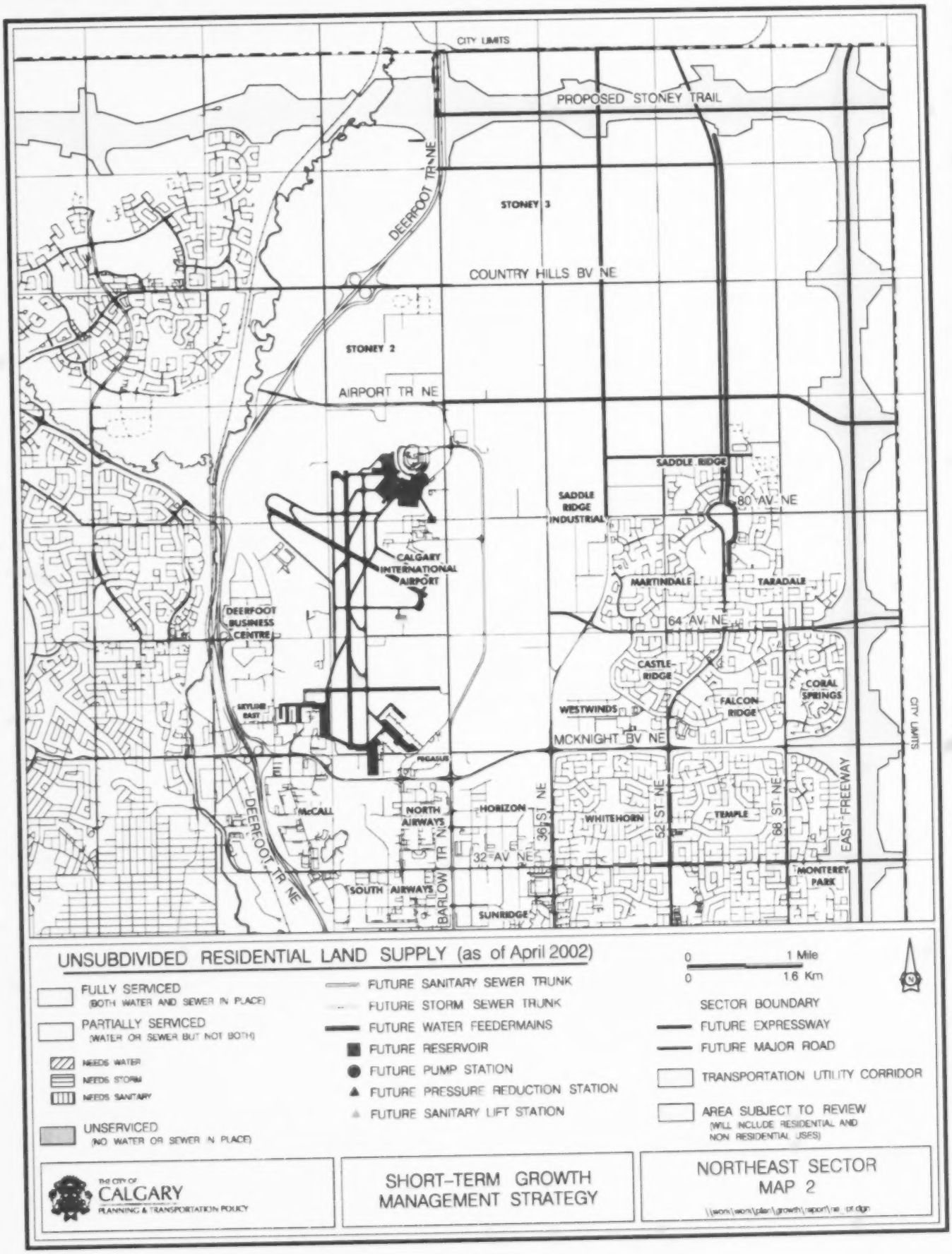
Source: Planning & Transportation Policy 2003


CITY LIMITS
PROPOSED STONEY TRAIL
DEERFOOT TR NE
STONEY 3
COUNTRY HILLS BV NE
STONEY 2
AIRPORT TR NE
SADDLE RIDGE
SADDLE RIDGE INDUSTRIAL
80 AV NE
CALGARY INTERNATIONAL AIRPORT
MARTINDALE
TARADALE
64 AV NE
DEERFOOT BUSINESS CENTRE
CASTLE RIDGE
CORAL SPRINGS
FALCON RIDGE
WESTWINDS
MCKNIGHT BV NE
CITY LIMITS
PEGASUS
McCALL
NORTH AIRWAYS
HORIZON
36 ST NE
WHITEHORN
52 ST NE
TEMPLE
68 ST NE
EAST FREEWAY
32 AV NE
SOUTH AIRWAYS
BARLOW TR NE
SUNRIDGE
MONTEREY PARK
UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 2002)
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FUTURE SANITARY SEWER TRUNK
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FUTURE WATER FEEDERMAINS
FUTURE RESERVOIR
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FUTURE PRESSURE REDUCTION STATION
FUTURE SANITARY LIFT STATION
0 1 Mile
0 1.6 Km
SECTOR BOUNDARY
FUTURE EXPRESSWAY
FUTURE MAJOR ROAD
TRANSPORTATION UTILITY CORRIDOR
AREA SUBJECT TO REVIEW
(WILL INCLUDE RESIDENTIAL AND NON RESIDENTIAL USES)
The CITY OF CALGARY
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SHORT-TERM GROWTH MANAGEMENT STRATEGY
NORTHEAST SECTOR MAP 2
\\wos\wos\plan\growth\report\ne_st.dgn

Figure 9 East Sector, Recent Growth in Housing

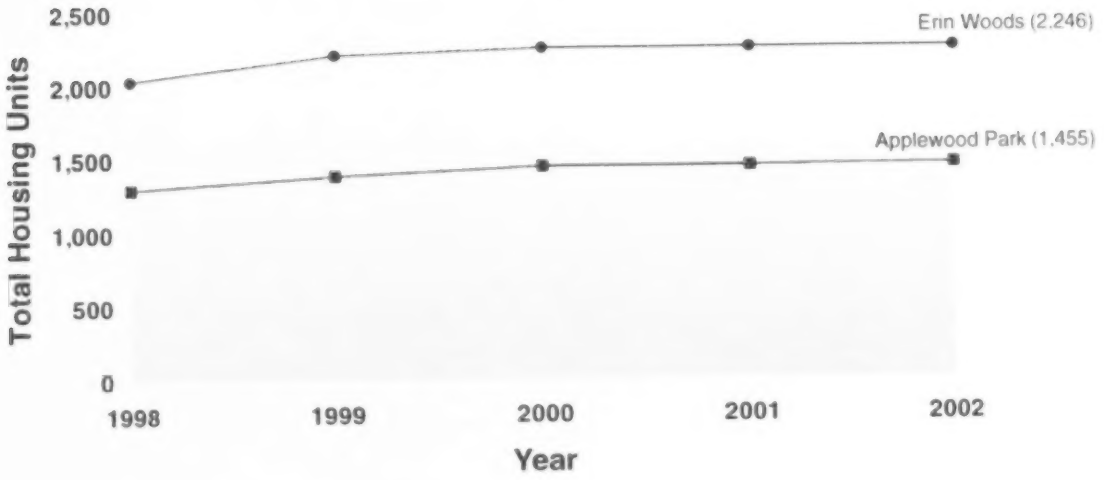
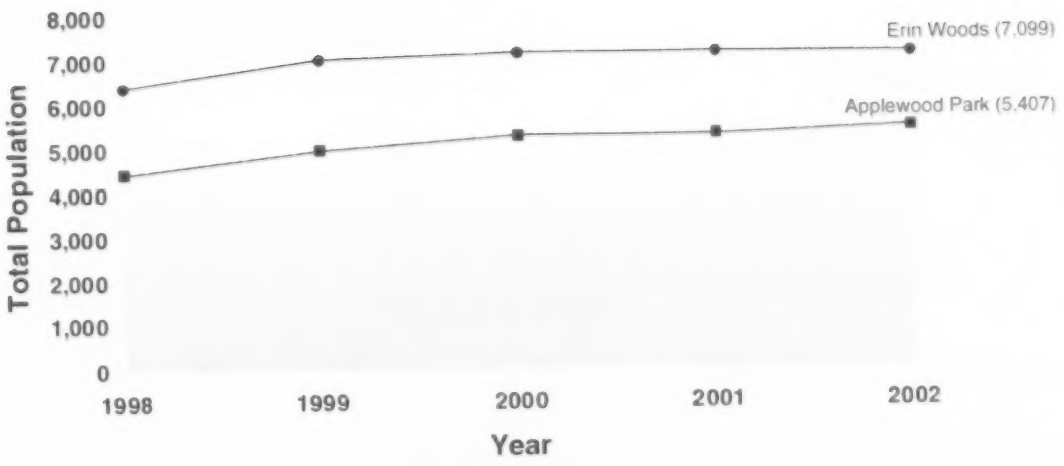


Figure 10 East Sector, Recent Growth in Population



Source: Civic Census 2002

Figure 11 East Sector, Housing Capacity of Developing Communities

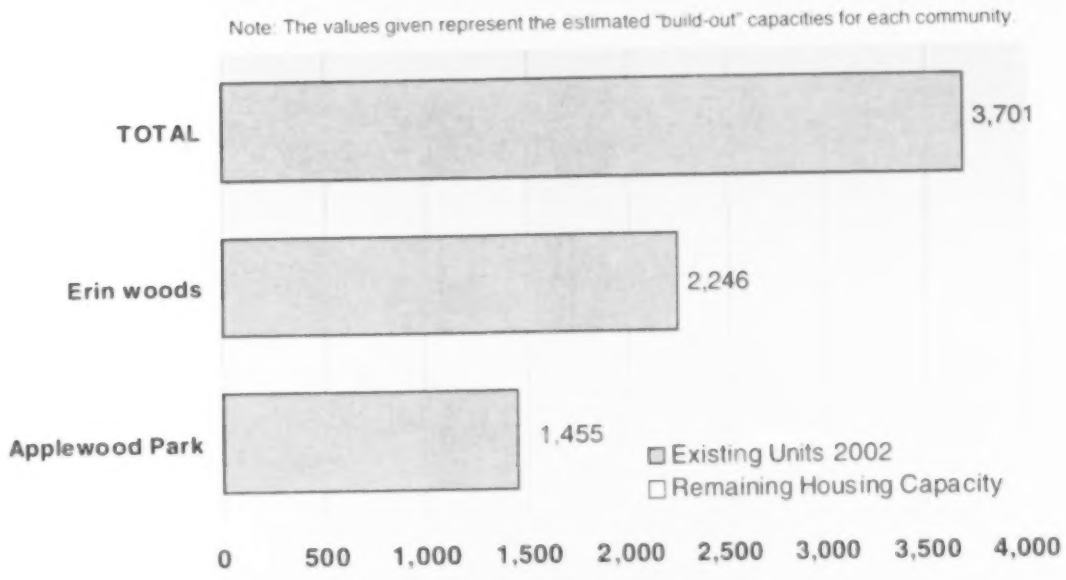
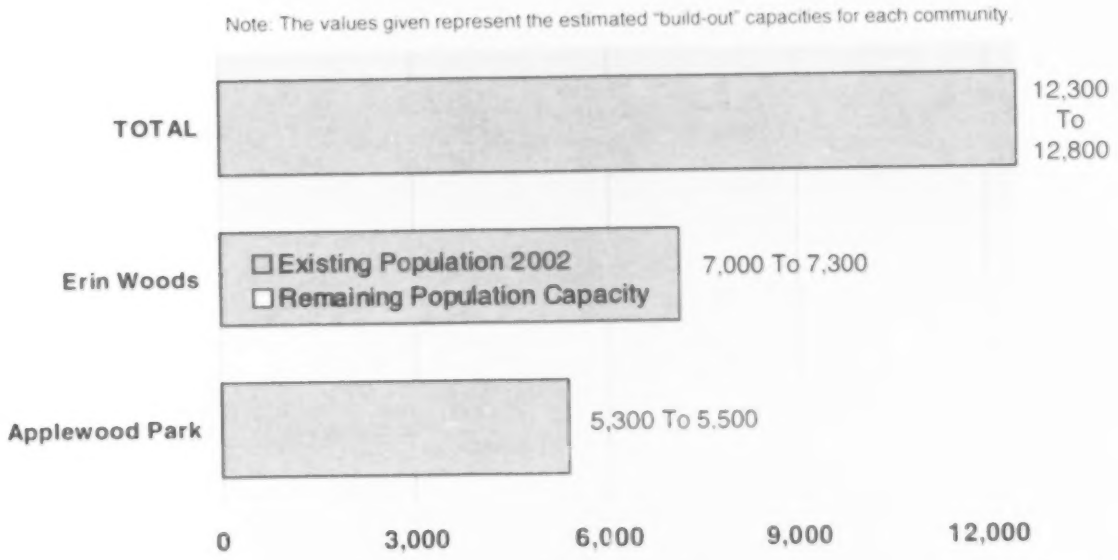
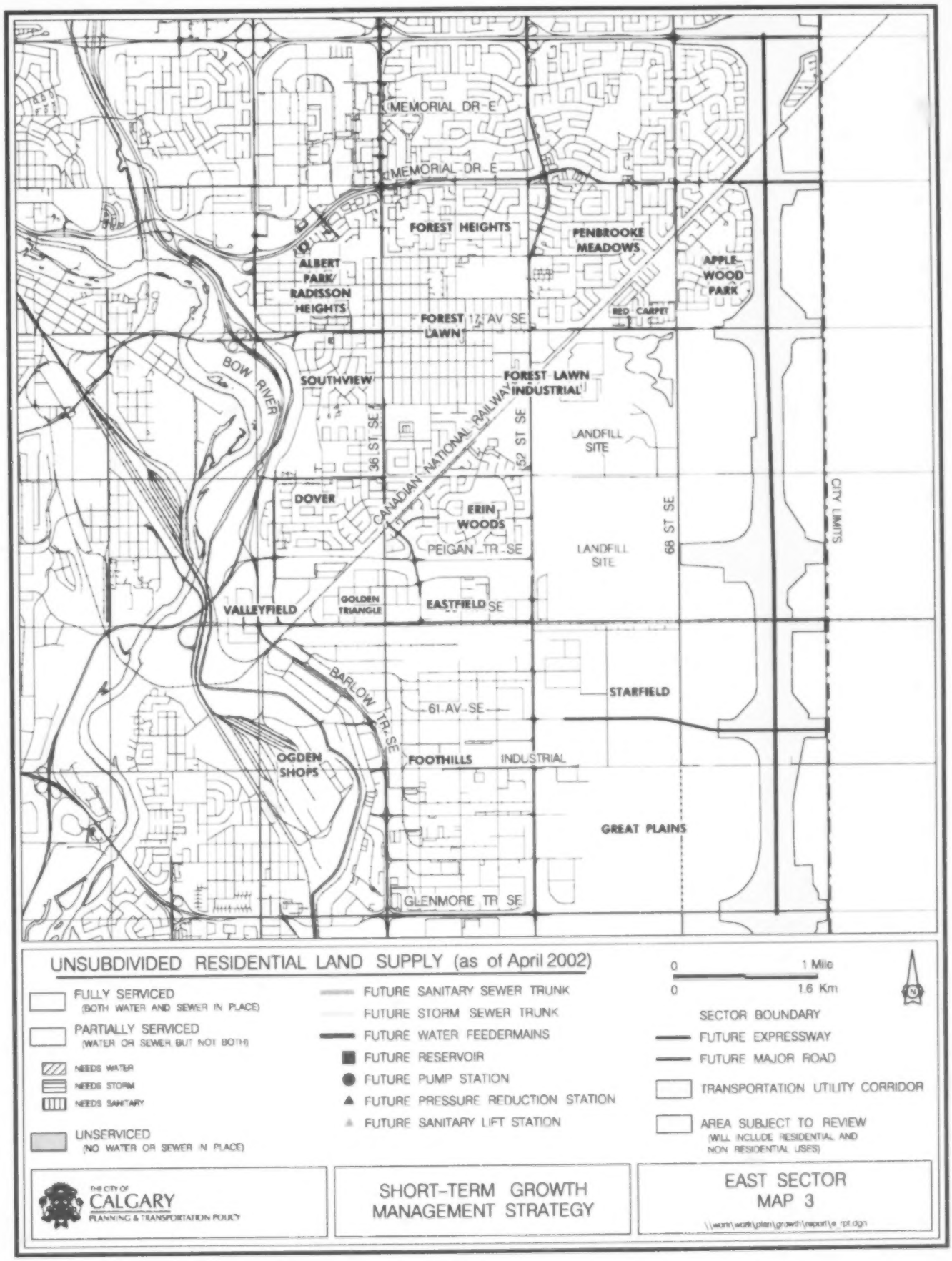


Figure 12 East Sector, Population Capacity of Developing Communities



Estimated housing and population capacities are based on planning approvals currently in place and / or on development densities generally being achieved in new areas. Estimates do not include recently annexed lands without policy plans in place (refer to Sector Maps for locations). For existing housing and population capacity see the previous page.

Source: Planning & Transportation Policy 2003


MEMORIAL DR-E
MEMORIAL DR-E
FOREST HEIGHTS
PENBROOKE MEADOWS
ALBERT PARK/ RADISSON HEIGHTS
APPLE-WOOD PARK
FOREST LAWN
17 AV SE
RED CARPET
BOW RIVER
SOUTHVIEW
FOREST LAWN INDUSTRIAL
36 ST SE
CANADIAN NATIONAL RAILWAY
52 ST SE
LANDFILL SITE
DOVER
ERIN WOODS
68 ST SE
CITY LIMITS
PEIGAN TR SE
LANDFILL SITE
VALLEYFIELD
GOLDEN TRIANGLE
EASTFIELD SE
BARLOW TR SE
STARFIELD
61 AV SE
OGDEN SHOPS
FOOTHILLS INDUSTRIAL
GREAT PLAINS
GLENMORE TR SE
UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 2002)
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PARTIALLY SERVICED
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NEEDS WATER
NEEDS STORM
NEEDS SANITARY
UNSERVICED
(NO WATER OR SEWER IN PLACE)
FUTURE SANITARY SEWER TRUNK
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FUTURE WATER FEEDERMAINS
FUTURE RESERVOIR
FUTURE PUMP STATION
FUTURE PRESSURE REDUCTION STATION
FUTURE SANITARY LIFT STATION
0 1 Mile
0 1.6 Km
SECTOR BOUNDARY
FUTURE EXPRESSWAY
FUTURE MAJOR ROAD
TRANSPORTATION UTILITY CORRIDOR
AREA SUBJECT TO REVIEW
(WILL INCLUDE RESIDENTIAL AND NON RESIDENTIAL USES)
THE CITY OF CALGARY
PLANNING & TRANSPORTATION POLICY
SHORT-TERM GROWTH MANAGEMENT STRATEGY
EAST SECTOR
MAP 3
\\wam\work\plan\growth\report\e rpt.dgn

Figure 13 Southeast Sector, Recent Growth in Housing

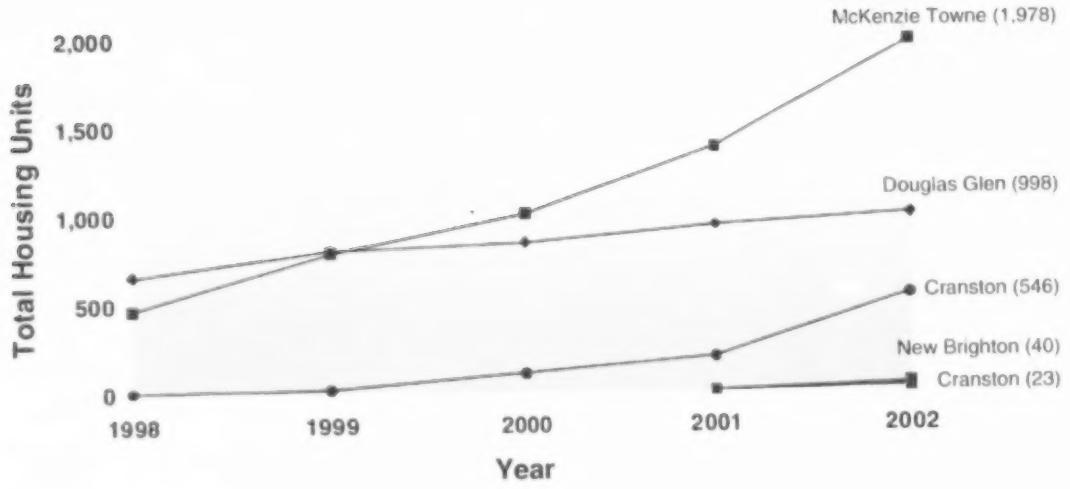
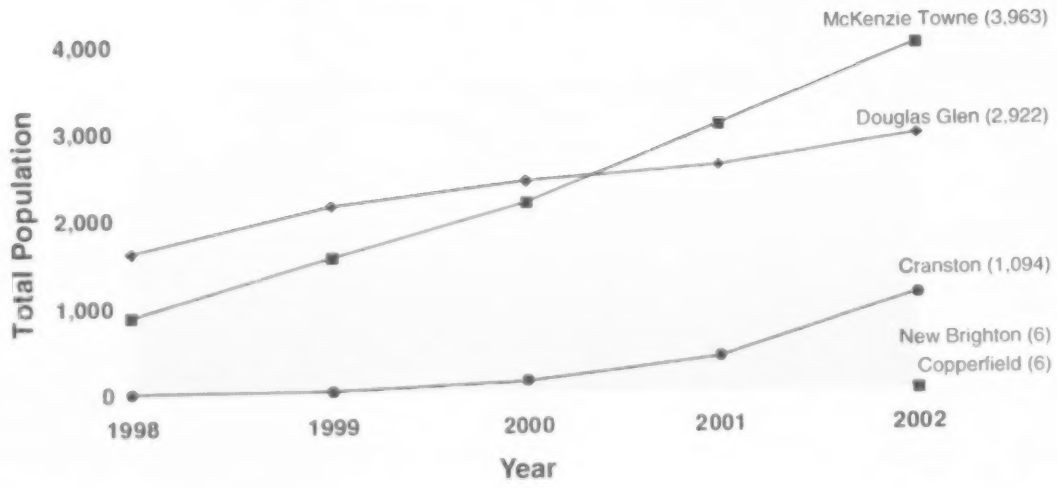


Figure 14 Southeast Sector, Recent Growth in Population



Source: Civic Census 2002

Figure 15 Southeast Sector, Housing Capacity of Developing Communities

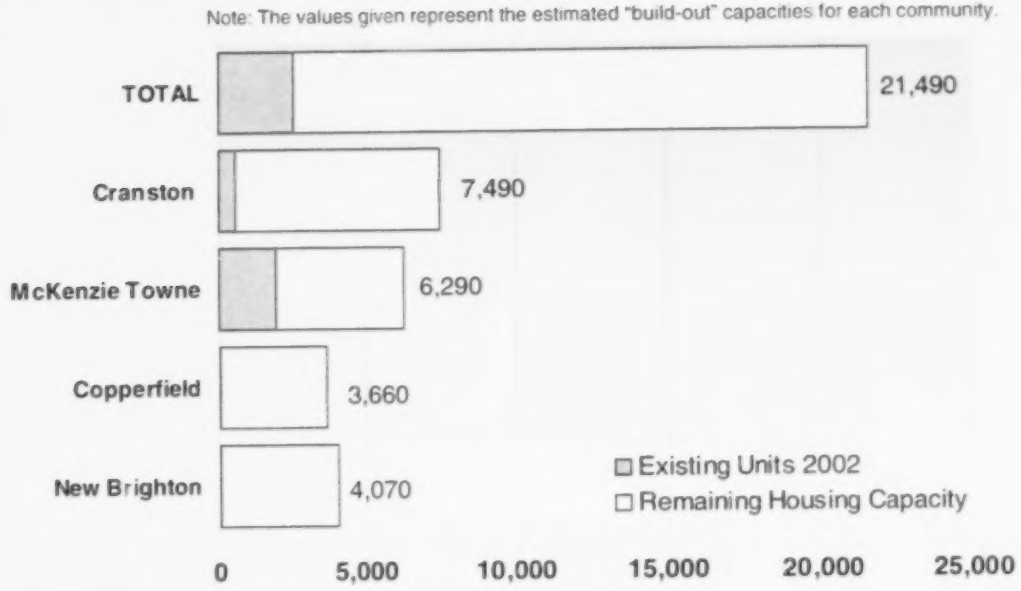
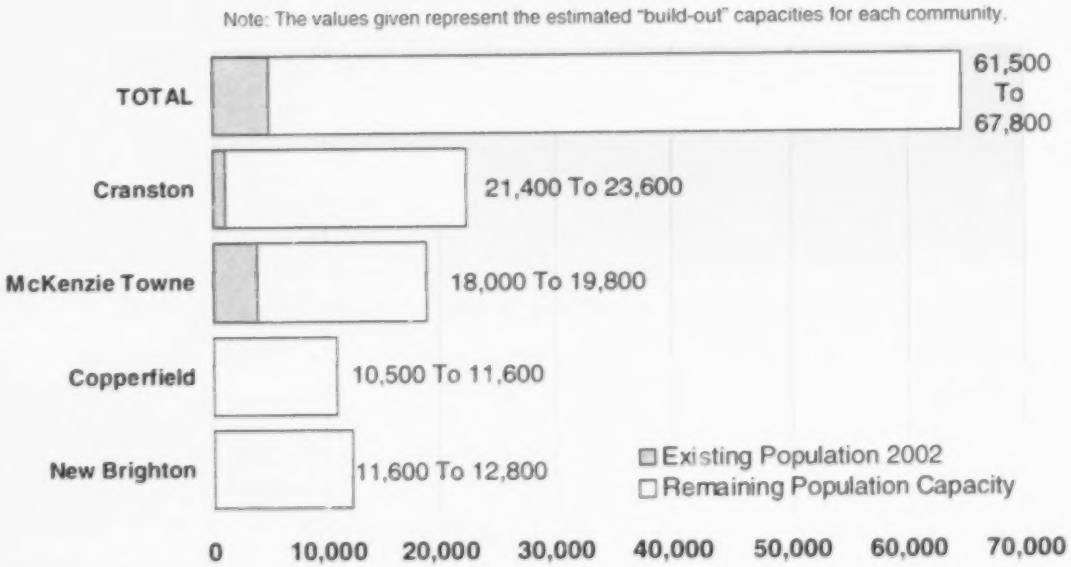
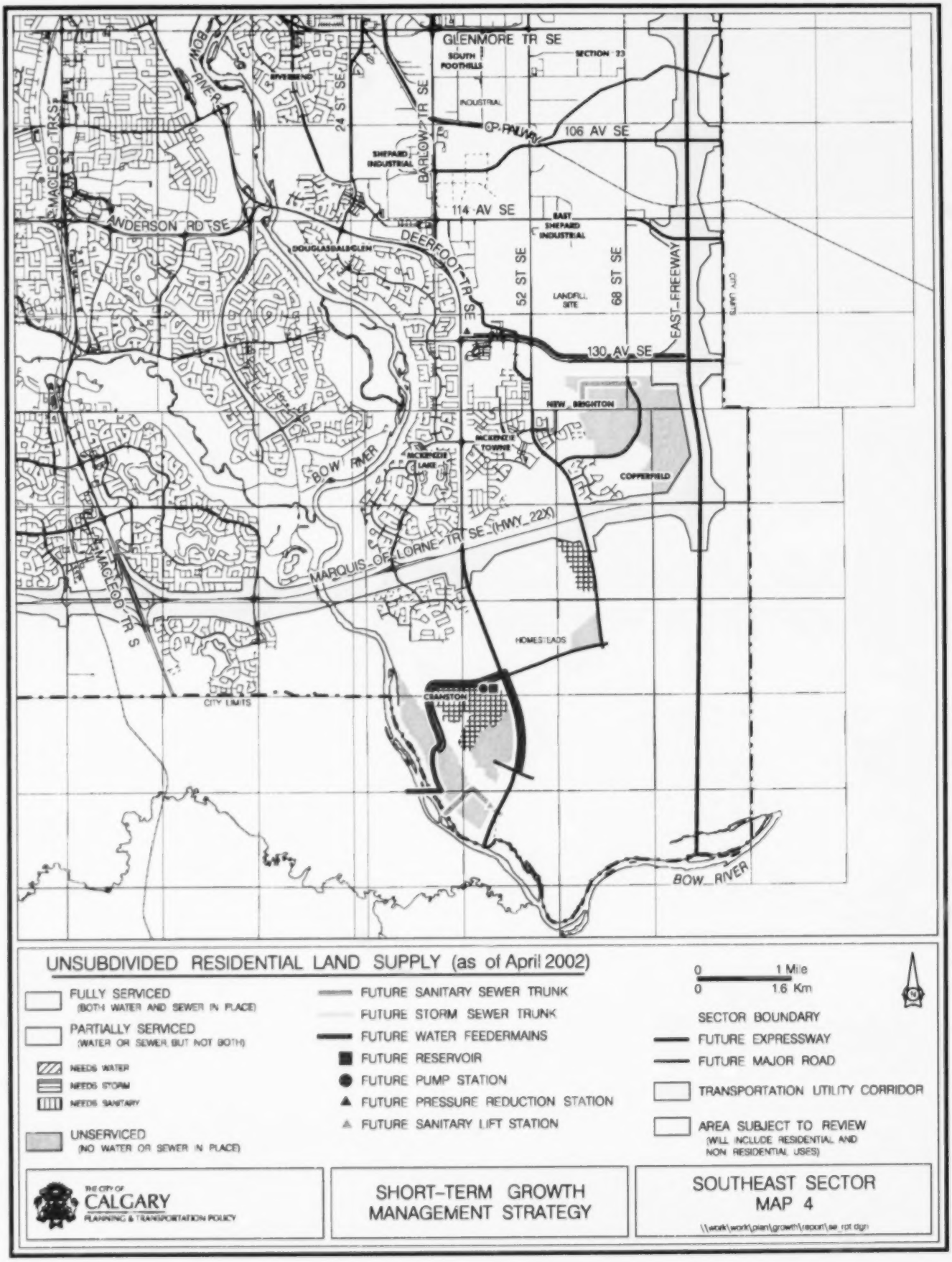


Figure 16 Southeast Sector, Population Capacity of Developing Communities



Estimated housing and population capacities are based on planning approvals currently in place and / or on development densities generally being achieved in new areas. Estimates do not include recently annexed lands without policy plans in place (refer to Sector Maps for locations). For existing housing and population capacity see the previous page.

Source: Planning & Transportation Policy 2003



UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 2002)

- FULLY SERVICED (BOTH WATER AND SEWER IN PLACE)
- PARTIALLY SERVICED (WATER OR SEWER BUT NOT BOTH)
  - NEEDS WATER
  - NEEDS STORM
  - NEEDS SANITARY
- UNSERVICED (NO WATER OR SEWER IN PLACE)

- FUTURE SANITARY SEWER TRUNK
- FUTURE STORM SEWER TRUNK
- FUTURE WATER FEEDERMAINS
- FUTURE RESERVOIR
- FUTURE PUMP STATION
- FUTURE PRESSURE REDUCTION STATION
- FUTURE SANITARY LIFT STATION

0 1 Mile
0 1.6 Km

- SECTOR BOUNDARY
- FUTURE EXPRESSWAY
- FUTURE MAJOR ROAD
- TRANSPORTATION UTILITY CORRIDOR
- AREA SUBJECT TO REVIEW (WILL INCLUDE RESIDENTIAL AND NON RESIDENTIAL USES)

THE CITY OF CALGARY
PLANNING & TRANSPORTATION POLICY

SHORT-TERM GROWTH MANAGEMENT STRATEGY

SOUTHEAST SECTOR
MAP 4

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Figure 17 South Sector, Recent Growth in Housing

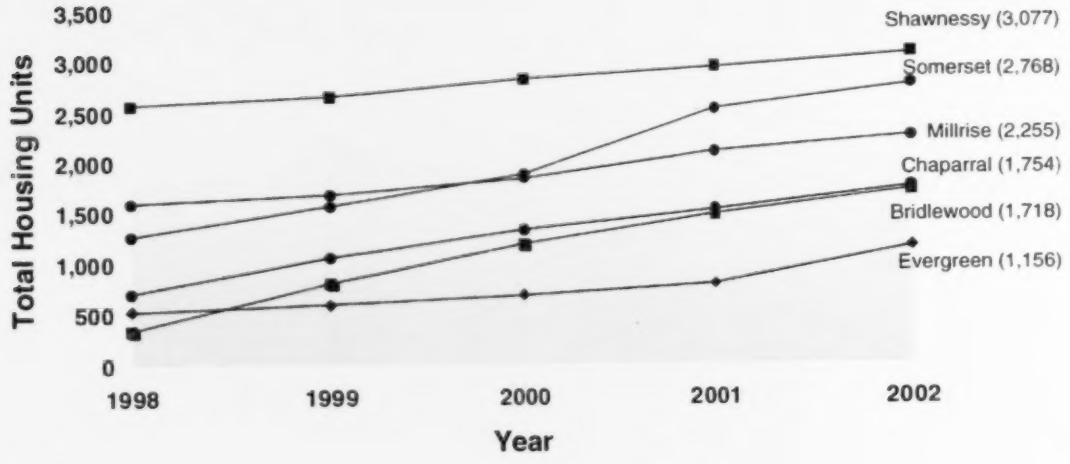
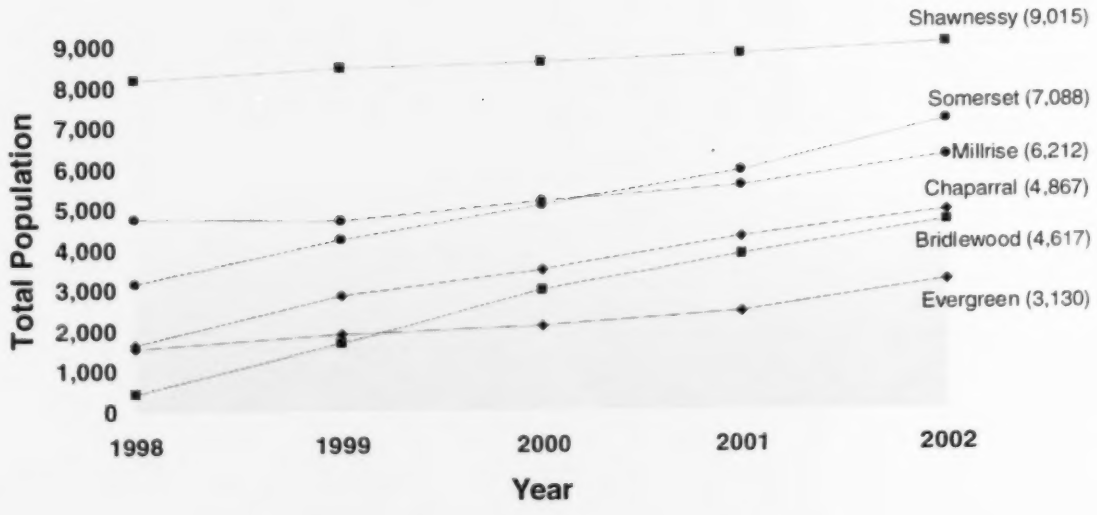


Figure 18 South Sector, Recent Growth in Population



Source: Civic Census 2002

Figure 19 South Sector, Housing Capacity of Developing Communities

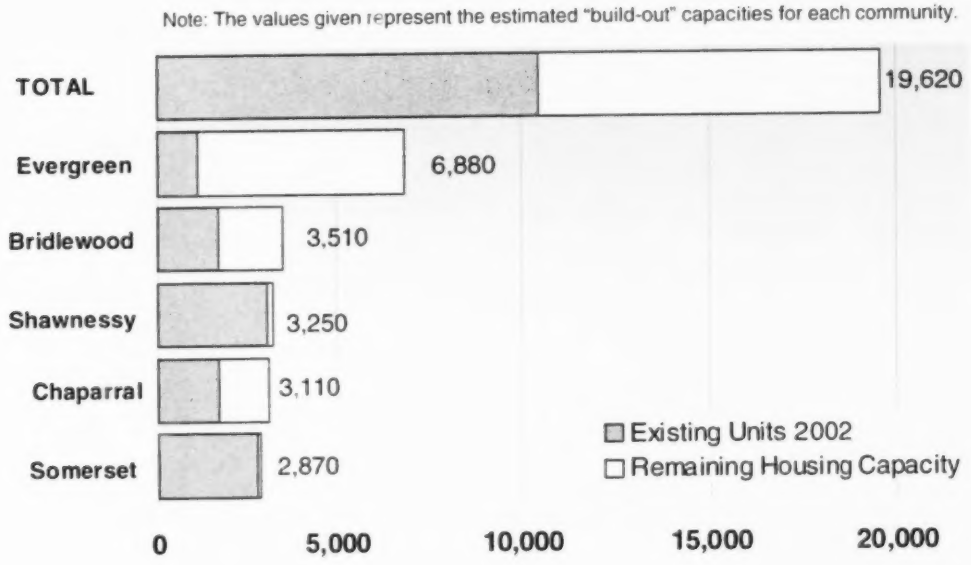
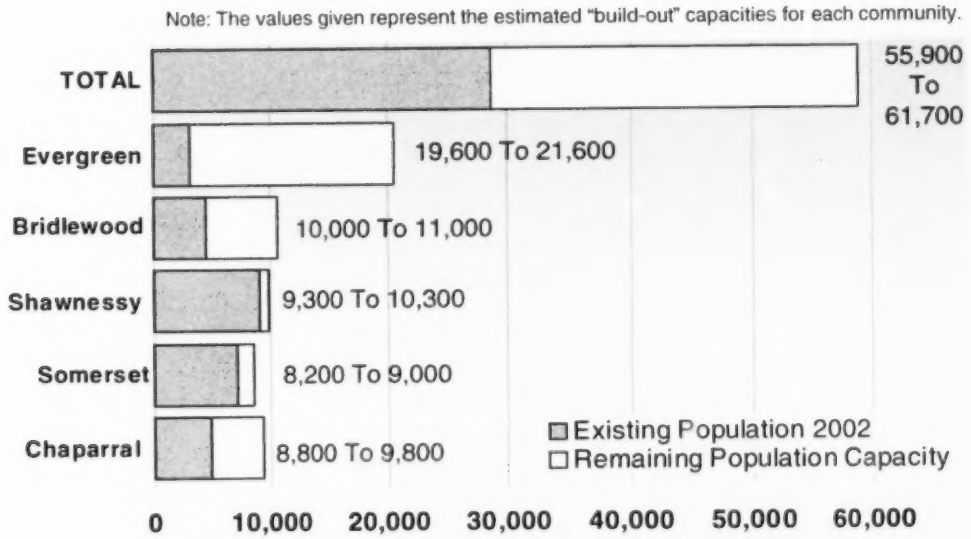


Figure 20 South Sector, Population Capacity of Developing Communities



Estimated housing and population capacities are based on planning approvals currently in place and / or on development densities generally being achieved in new areas. Estimates do not include recently annexed lands without policy plans in place (refer to Sector Maps for locations). For existing housing and population capacity see the previous page.

Source: Planning & Transportation Policy 2003

UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 2002)

- FULLY SERVICED (BOTH WATER AND SEWER IN PLACE)
- PARTIALLY SERVICED (WATER OR SEWER, BUT NOT BOTH)
  - NEEDS WATER
  - NEEDS STORM
  - NEEDS SANITARY
- UNSERVICED (NO WATER OR SEWER IN PLACE)

- FUTURE SANITARY SEWER TRUNK
- FUTURE STORM SEWER TRUNK
- FUTURE WATER FEEDERMAINS
- FUTURE RESERVOIR
- FUTURE PUMP STATION
- FUTURE PRESSURE REDUCTION STATION
- FUTURE SANITARY LIFT STATION

0 1 Mile
0 1.6 Km

- SECTOR BOUNDARY
- FUTURE EXPRESSWAY
- FUTURE MAJOR ROAD
- TRANSPORTATION UTILITY CORRIDOR
- AREA SUBJECT TO REVIEW (WILL INCLUDE RESIDENTIAL AND NON RESIDENTIAL USES)

THE CITY OF CALGARY
PLANNING & TRANSPORTATION POLICY

SHORT-TERM GROWTH MANAGEMENT STRATEGY

SOUTH SECTOR
MAP 5

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Figure 21 West Sector, Recent Growth in Housing

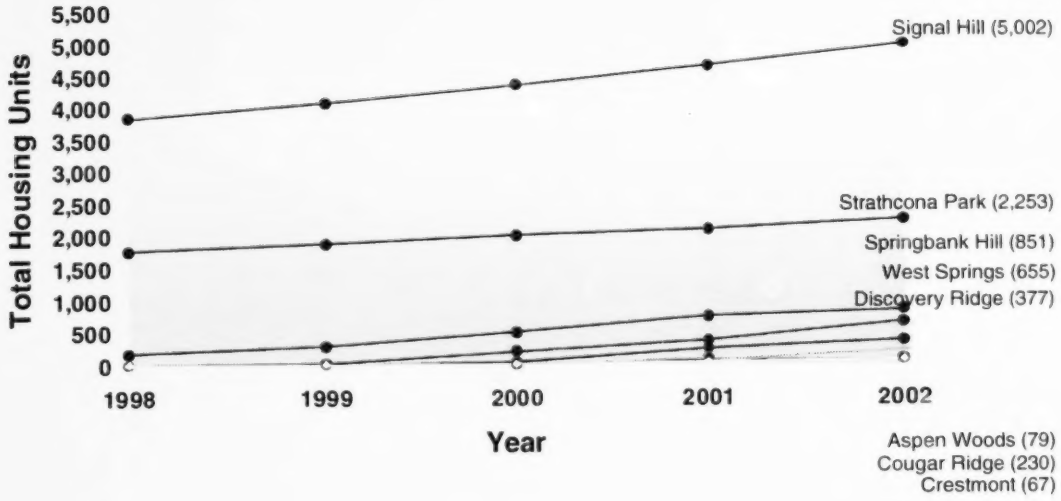
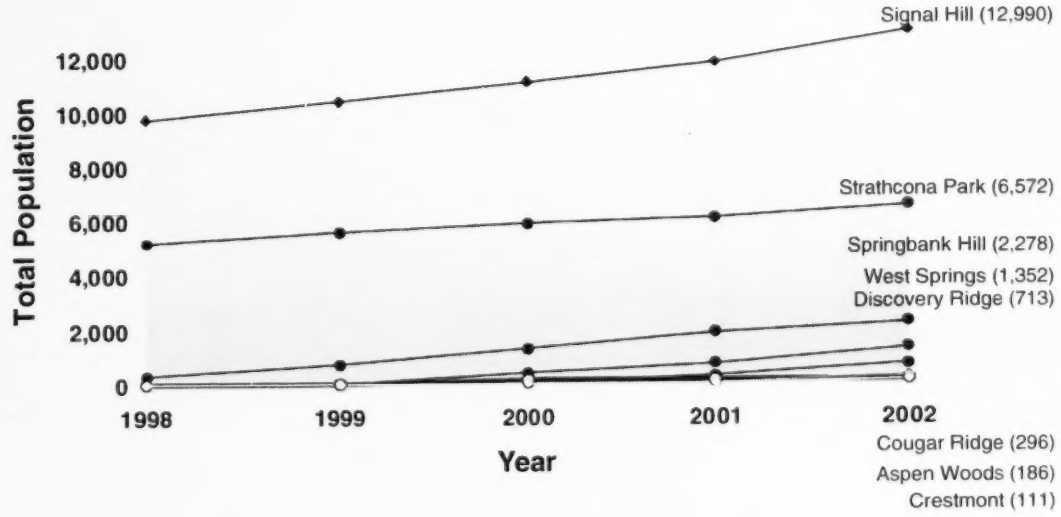


Figure 22 West Sector, Recent Growth in Population



Source: Civic Census 2002

Figure 23 West Sector, Housing Capacity of Developing Communities

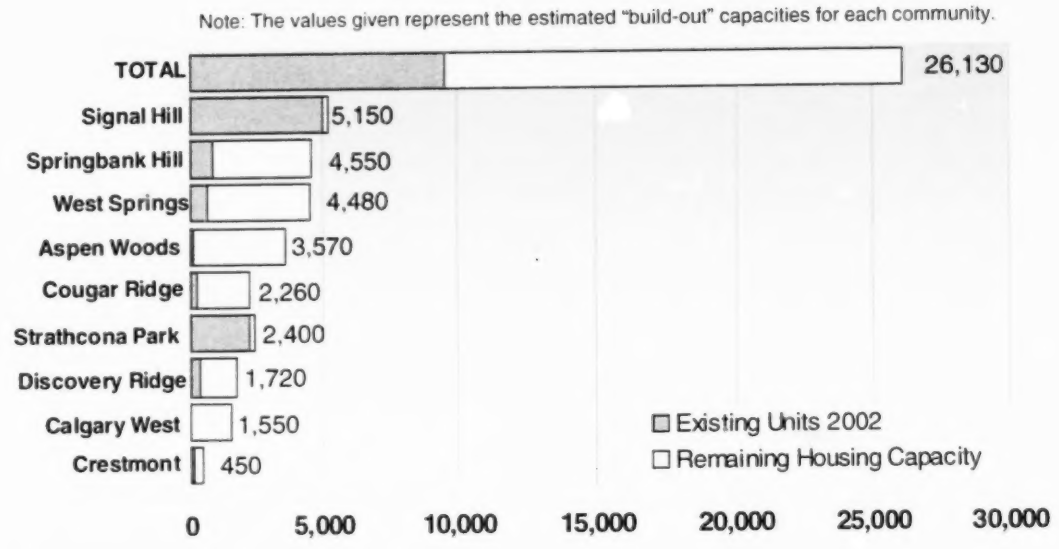
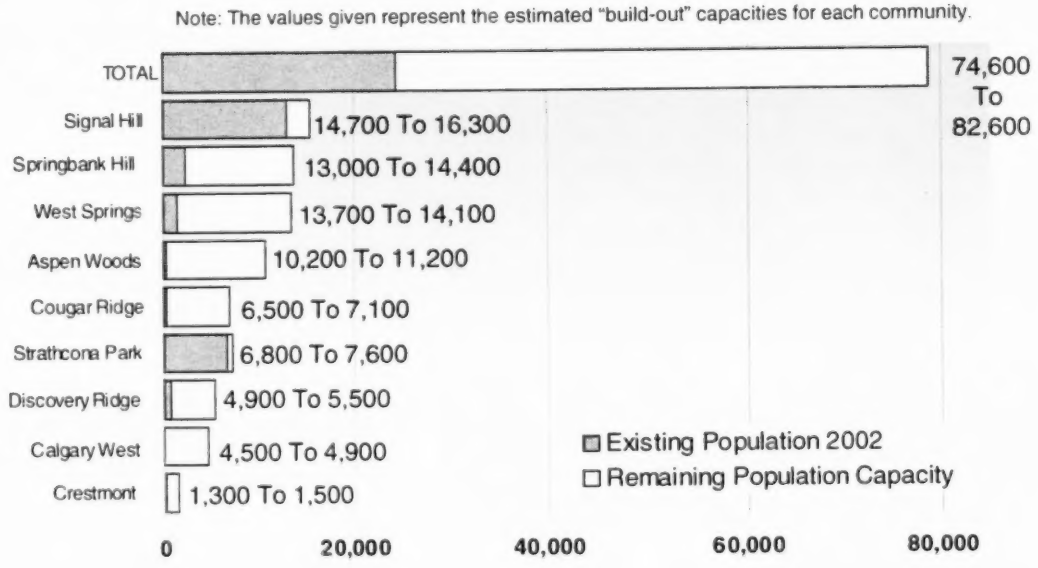
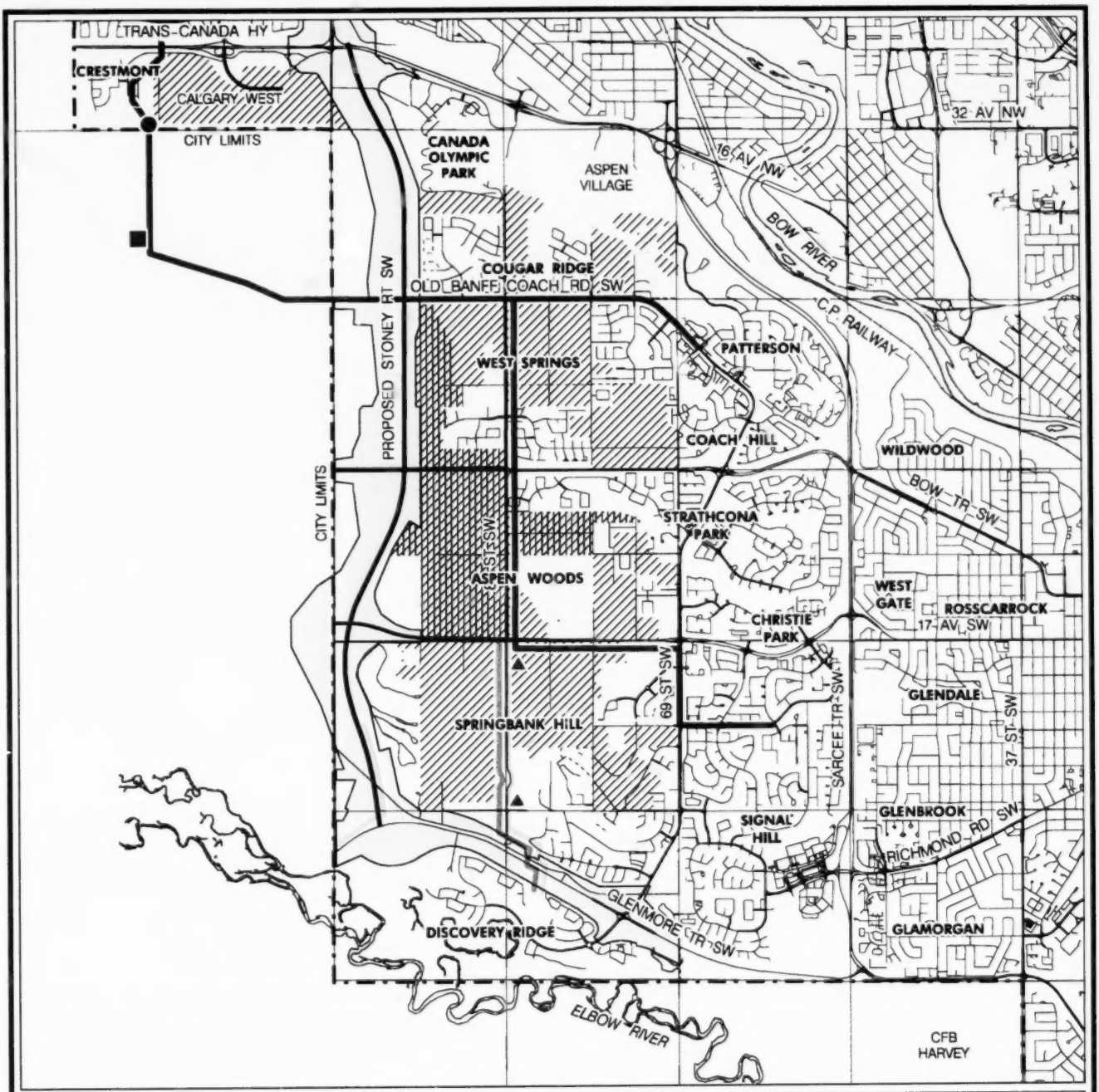


Figure 24 West Sector, Population Capacity of Developing Communities



Estimated housing and population capacities are based on planning approvals currently in place and / or on development densities generally being achieved in new areas. Estimates do not include recently annexed lands without policy plans in place (refer to Sector Maps for locations). For existing housing and population capacity see the previous page.

Source: Planning & Transportation Policy 2003



UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 2002)

- FULLY SERVICED (BOTH WATER AND SEWER IN PLACE)
- PARTIALLY SERVICED (WATER OR SEWER, BUT NOT BOTH)
  - NEEDS WATER
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- FUTURE SANITARY LIFT STATION

0 1 Mile
0 1.6 Km

- SECTOR BOUNDARY
- FUTURE EXPRESSWAY
- FUTURE MAJOR ROAD
- TRANSPORTATION UTILITY CORRIDOR
- AREA SUBJECT TO REVIEW

THE CITY OF CALGARY
PLANNING & TRANSPORTATION POLICY

SHORT-TERM GROWTH MANAGEMENT STRATEGY

WEST SECTOR
MAP 6

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Figure 25 Northwest Sector, Recent Growth in Housing

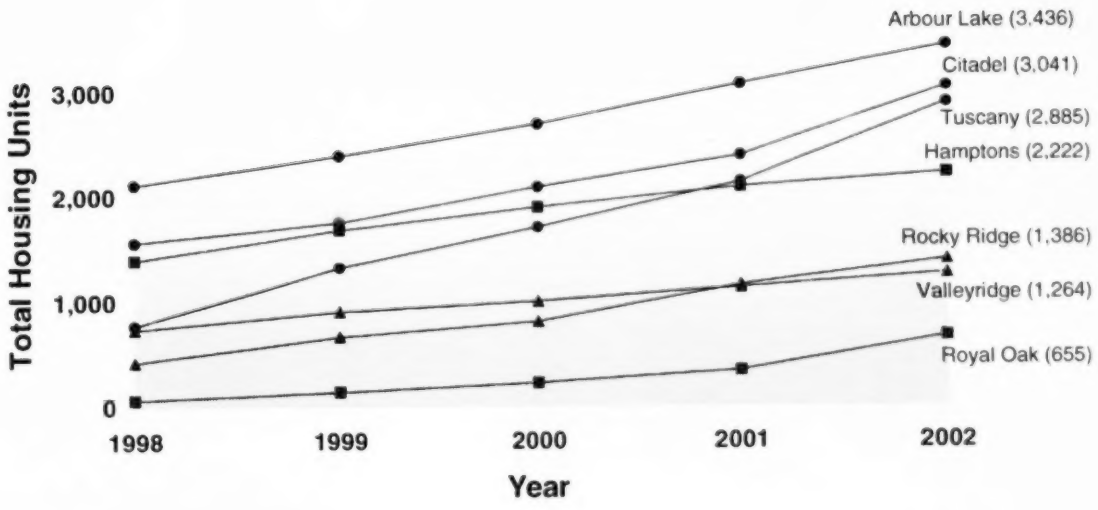
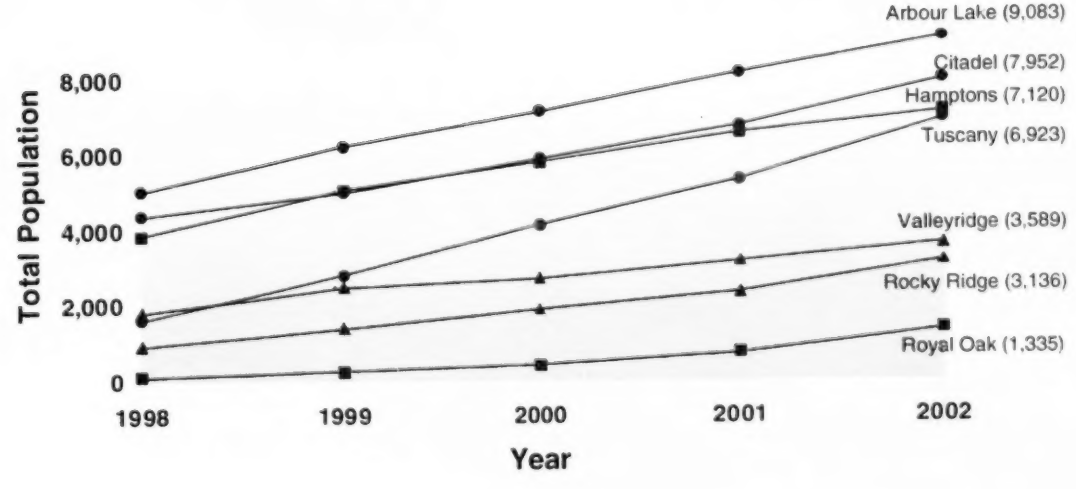


Figure 26 Northwest Sector, Recent Growth in Population



Source: Civic Census 2002

Figure 27 Northwest Sector, Housing Capacity of Developing Communities

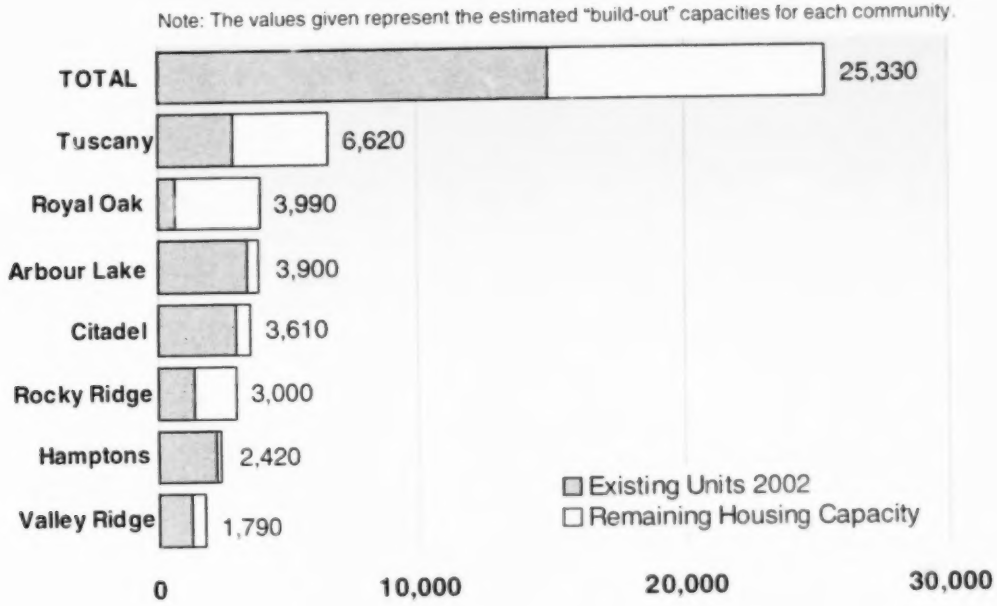
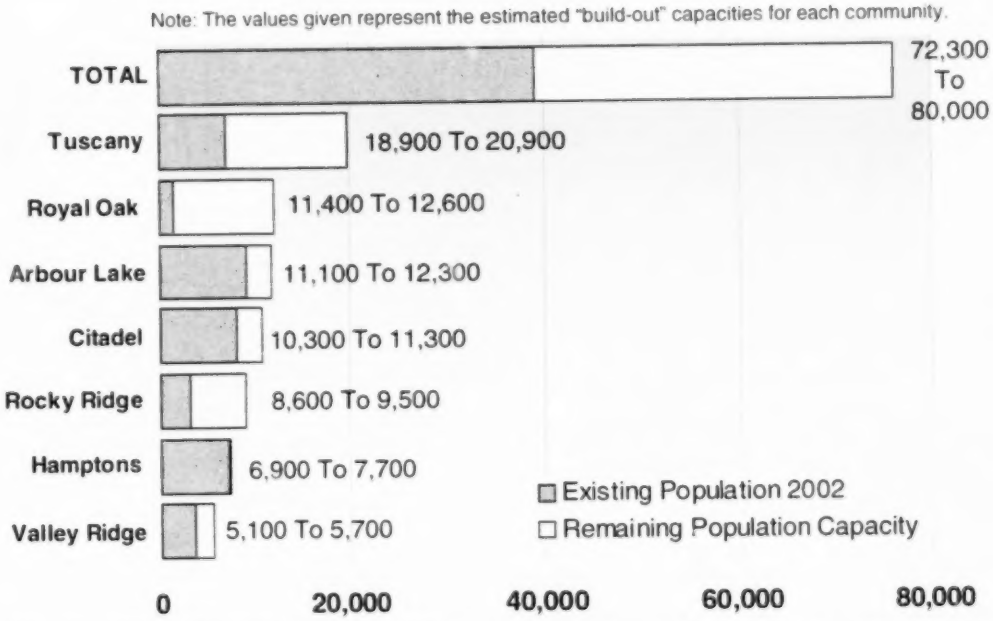


Figure 28 Northwest Sector, Population Capacity of Developing Communities



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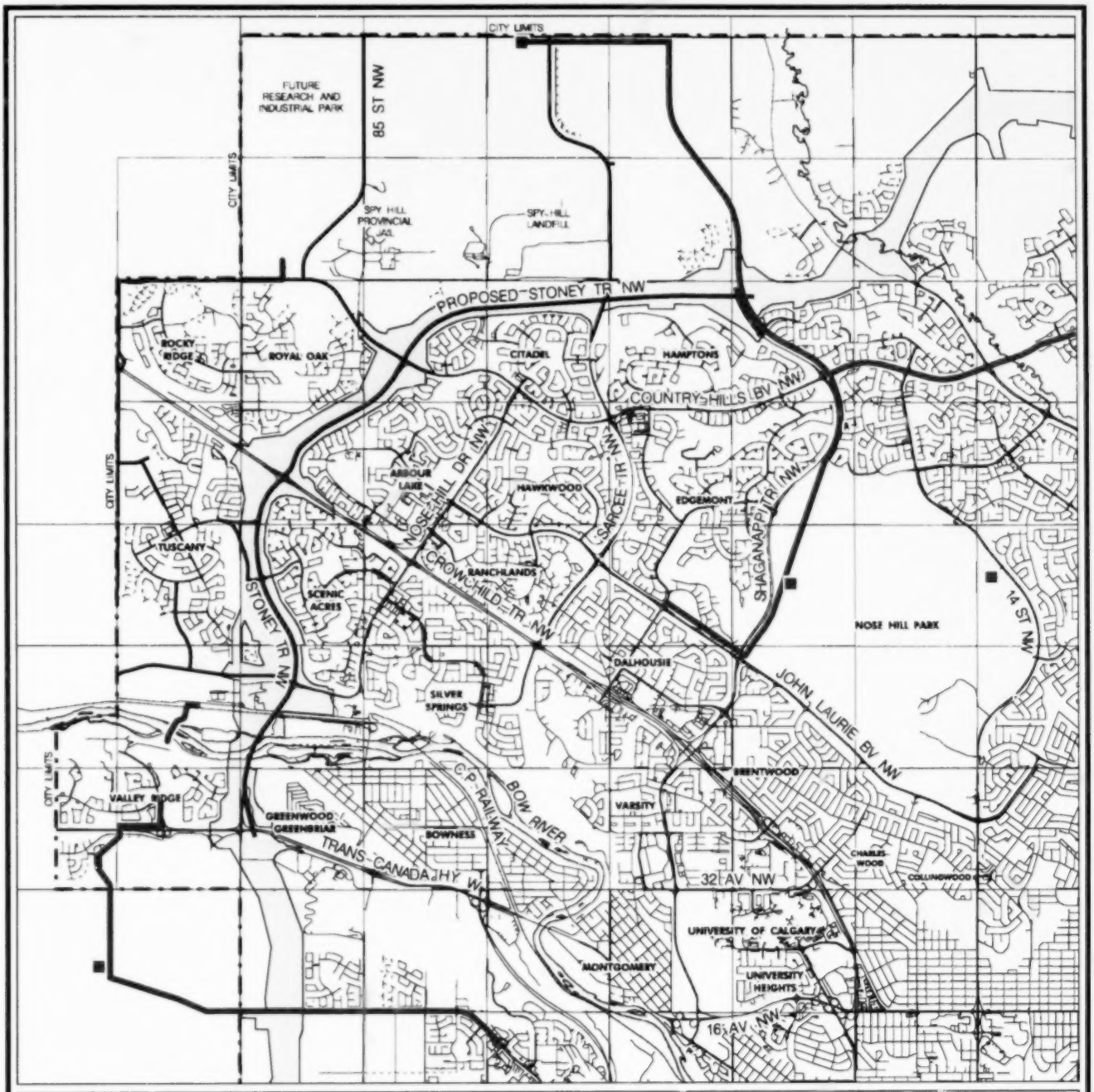
Source: Planning & Transportation Policy 2003



UNSUBDIVIDED RESIDENTIAL LAND SUPPLY (as of April 2002)

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THE CITY OF CALGARY
PLANNING & TRANSPORTATION POLICY

SHORT-TERM GROWTH MANAGEMENT STRATEGY

NORTHWEST SECTOR
MAP 7

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APPENDIX III

DEVELOPMENT INDUSTRY COMMENTS

URBAN DEVELOPMENT INSTITUTE CALGARY CHAPTER

SUITE 265, 999 - 8th STREET S.W., CALGARY, ALBERTA T2R 1J5
PHONE: (403) 531-6250 FAX: (403) 531-6252 E-MAIL: info@udicalgary.com WEBSITE: www.udicalgary.com

June 16, 2003

Mr. Decker Shields
Planning and Transportation Policy
Land Use and Mobility, Location #8108
City of Calgary
P.O. Box 2100, Station M
Calgary, AB T2P 2M5

Dear Decker:

RE: 2003 to 2007 Residential Short Term Growth Management Strategy

Thank you for the opportunity to review and provide input into the 2003 Short Term Growth Management Strategy. We are pleased that you have revised the purpose section to reflect, more clearly, the overall intent of this document. We are concerned that this document is becoming a foundation for planning decisions on specific applications rather than reflecting the intent of the document which is to provide a thorough overview of development trends, patterns and strategies at the sector level. Consequently, we are happy that some wording in the draft will be reworked to clarify meaning.

As mentioned throughout our discussions on this matter, the main issue has been the allocation of market shares to various sectors of the City. We appreciate the movement on the southeast sector from 16 to 18% and the text added to the demand assumptions section for the southeast and west. We believe this more accurately reflects the trends for growth in these areas. Lastly, the text added to clarify the purpose of the overall map in the Executive Summary and the conclusions helps establish the forecast growth locations as "possible" and not definitive. This is also echoed in the text added right to the map itself and we're appreciative of that clarification.

Again, the Urban Development Institute Calgary Chapter would be pleased to begin working with you earlier on the information included in this document to ensure that the theoretical projections closely match what our industry is seeing. Based on on-going discussions over the past years the city projections have been lower than industry forecasts and what is actually built each year.

Once again, thank you for the opportunity to review the STGMS. We are pleased to offer our support for the document.

Yours truly,

Judy A. Ferguson
Executive Director

cc: Roberto Binda, Chair, UDI Planning Committee
UDI Executive Committee

The mission of the Urban Development Institute Calgary Chapter is 'to represent the development industry in sustainable growth through partnerships and relationships with all stakeholders'

CALGARY REGION HOME BUILDERS ASSOCIATION

June 13, 2003

Mr. Decker Shields
Land Use & Mobility
Planning & Transportation Policy (#8117)
The City of Calgary
P.O. Box 2100
Postal Station M
Calgary, Alberta T2P 2M5

Subject: 2003-2007 Short Term Growth Management Strategy

Dear Mr. Shields:

Thank you for the opportunity to review the 2003-2007 Short Term Growth Management Strategy.

The CRHBA is pleased to offer its support of this document, and appreciate the opportunity to participate in the review and update of this annual process.

Sincerely

Donna K. Moore
Executive Officer

DKM/db

#100 3016 5th Avenue N.E., Calgary, Alberta T2A 6K4 Telephone (403) 235-1911 Fax (403) 248-1272
Email: info@crhba.com www.crhba.com